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Making Housing Data Management Easy!

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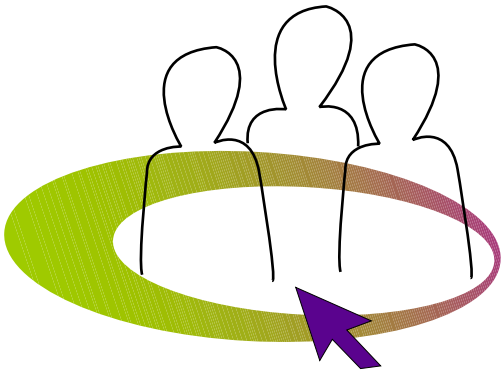
WinTen WorkOrder



User Manual Version 1/20/2003

For Program Version 12/23/2002 and later

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WinTen WorkOrder User Manual

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Contents

Introduction **1.1**

WinTen Basics **1.2**
- Navigation 1.2
  - Mouse Actions 1.2
  - Keyboard Actions 1.3
- Buttons 1.4
  - Standard Buttons 1.4
  - Grayed Out Options 1.7
  - Pull-Down Menus 1.8
  - Dialog Boxes 1.8
  - Drop-Down Selection Boxes 1.9
  - Check Boxes 1.9
  - Radio Buttons 1.9
  - Scrollbars 1.10
  - Tabs 1.10
  - Function Keys 1.11

Program Overview **2.1**
- Cyclical Actions 2.3
  - At the Beginning of the Month 2.3
  - During the Month 2.3
  - At the End of the Month 2.3
- Planning Questions 2.4

Main Menu **2.5**

Setup **3.1**
- Setup Screen 3.2
  - Default Settings Tab 3.2
  - Color Tab 3.5
  - Analysis Work Codes Tab 3.6
  - Maintenance Employees Tab 3.8
  - Fixed Price Codes Tab 3.10

Add New Work Orders **4.1**
- Input New Work Order Dialog Box 4.2
- Review Screen 4.3
  - Main Tab 4.5
  - Labor Tab 4.12
  - Materials Tab 4.14

Review/Edit Existing Work Orders **5.1**
- Search for an Item Screen 5.2
- Review Screen 5.3
  - Main Tab 5.5
  - Labor Tab 5.12
  - Materials Tab 5.14

Reports **6.1**
- Reports Screen 6.2
  - Producing a Report 6.3

Archive/Restore Data **7.1**

Adjust Work Order Number **8.1**
- Adjust WO# Dialog Box 8.2

Index Databases **9.1**

Introduction

The WinTen PROGRAM program is a data management program designed for use on computers running the Windows 95, 98, ME, NT, 2000, or XP operating system. The interface is designed for use in a Windows environment and includes point-and-click mouse actions, pull-down menus, and Windows-based help functions. This manual contains all of the information you need to use the WinTen PROGRAM program (hereafter referred to as NICKNAME).

Version Information

This manual is written for the DATE release of PROGRAM. It does not apply to previous versions of the program (including MS-DOS-based ones) and some sections may be inaccurate with regards to later versions.

Whenever Tenmast issues an update to this program, we will notify your agency through email. If you have a current Update & Support Agreement for this program, you may download and install the update through the Tenmast Update Manager program. During the download and installation process, Update Manager will notify you of the changes to the program.

We periodically update this manual to reflect significant changes to the program. You may download this updated documentation from our Web site at no charge.

Hint: Downloading Manuals

You can find the current version of this manual in the Client Service Area of our Web site at http://www.tenmast.com. All manuals are available in PDF file format. You must have version 4.0 or newer of Adobe Acrobat Reader to open and print manuals. You can also order printed copies of the manual through our Marketing/Communication Services Department.

Getting Help

Though we have made every effort to make this manual as comprehensive as possible, no document can cover all contingencies. If you encounter problems with PROGRAM, call the Tenmast Training & Support Department toll-free at (877) 359-5492 or send email to support@tenmast.com.

Revisions

To better serve our clients, we constantly update our manuals, just as we constantly make improvements in our programs. If you find an error or omission in this documentation or have a suggestion for improving it, call the Tenmast Marketing/Communication Services Department toll-free at (877) 836-6278 or send email to info@tenmast.com.

WinTen Basics

The WinTen programs are designed to provide quick and easy access to commands and data throughout Tenmast's programs. In WinTen programs, the mouse is the primary navigation tool.

The WinTen system consists of more than 20 independent data management programs that are capable of sharing data with one another. Though each program has its own unique functions and features, they all share certain common ones. The following WinTen introduction explains these common functions and features and how to use them.

Navigation

Mouse Actions

In many instances, this manual instructs you to ***click*** something in order to give the program a command. This refers to executing a command with your mouse. There are four different ways in which you may need to click to execute a command:

Click or Point-and-Click
Position the mouse pointer over the indicated object on the screen, then quickly press and release the left mouse button *once*.

Double-Click
Position the mouse pointer over the indicated object on the screen, then quickly press and release the left mouse button *twice*.

Right-Click
Position the mouse pointer over the indicated object on the screen, then quickly press and release the *right* mouse button *once*.

Drag and Drop
Position the mouse pointer over the indicated object on the screen, then *press and hold down* the left mouse button. While still holding down the button, move the mouse pointer to where you want to place the object and then release the button.

the mouse pointer

Keyboard Actions

There are many ways to issue commands in the WinTen programs with your *keyboard*. When this manual instructs you to “press” a key or keys, it refers to the keys on your keyboard. The manual indicates a specific key by enclosing it in less-than and greater-than signs. For example, <Enter> means “the Enter key.”

Moving Focus

When you first enter a screen, “focus” is on a particular button or data field. The program shows focus with a dotted line around the inside of a button (as shown at right) or a flashing cursor in a data field. When a button has focus, you can activate it by pressing <Enter>, which has the same effect as if you had clicked on it. When a data field has focus, you can type data into it. You can move focus in either situation by pressing <Tab>. If you are on a menu of buttons, you can also move focus by using the arrow keys.

with focus

without focus

Keyboard Shortcuts

Some commands have “keyboard shortcuts.” This means you can execute the command through a combination of keys. Keyboard shortcuts use a combination of a letter or number key plus either the <Alt> (Alternate) or <Ctrl> (Control) key. The manual abbreviates these commands in the format <key+key>. For example, a command that you give “by pressing <Alt+X>” is performed by holding down <Alt> and pressing <X>.

The <Ctrl> and <Alt> keys are keys that modify the way that the computer interprets other keys, much like <Shift> does. When a key combination includes one of these keys, it’s best to press and hold the modifying key before pressing the other key in the combination, because the modifying key won’t type anything. To continue the previous comparison, this is like using <Shift> to capitalize the letter “a” while doing word processing. If you pressed and held <A> before pressing <Shift>, you’d type something like “aaaaaaaA.” However, if you pressed and held <Shift> first, you’d just type “A.” The same holds true for issuing commands with key combinations that include <Alt> or <Ctrl>.

Buttons

In all WinTen programs, the screens contain ***buttons*** to access functions. Buttons are square or rectangular and may contain pictures, text, or both. This manual indicates a button with its name ("the Reports button") and/or a picture (as shown at right). You can use buttons in three ways:

1. Point-and-click.
2. Move focus to the button and press <Enter> (remember, you move focus with <Tab> or the arrow keys).
3. Press the key that corresponds to the underlined letter on the button, if the button has text on it. On the Reports button shown to the right, this would be <R>.

Standard Buttons

Several buttons are standard in all WinTen programs. This means they always have the same function regardless of the program in which they appear.

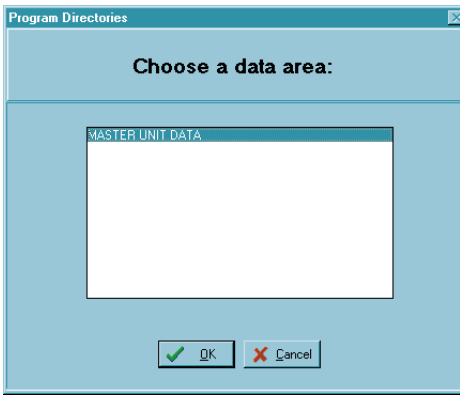
Main Menu Buttons

These standard buttons are found on the Main Menu screen.

Change Password Button
This button opens the Change Password dialog box. To change your WinTen password, you must first enter your old password to confirm your identity. Then type your new password in two separate fields, which keeps you from accidentally mistyping your new password and setting it to something other than what you intended. The OK button remains disabled until you have the same thing in both new password fields.

NOTE: The Change Password button is not available if you do not have Tenmast Security activated.

Change Directories Button
This button opens the Program Directories dialog box (shown at far right). This dialog box allows you to change the data area in which you are working. Click the desired data area to select it, then click the OK button.



NOTE: The Change Directories button is not available if the program only has one data area in which to work.

Version Button
This button opens a dialog box (shown at far right) that displays the version date of the program. Click the OK button to close this dialog box.

Reports Button
The Reports button opens the program's Reports screen. The specific reports you can view and print from this screen vary depending on the program in question. See the appropriate chapter of this manual for details.

Index Button
The Index button allows you to re-index and/or pack the program's databases. See the appropriate chapter of this manual for details.

Setup Button
The Setup button opens the program's Setup screen. This screen allows you to change the basic information that the program uses to generate reports and/or track and present data. See the appropriate chapter of this manual for details.

Exit Button
The Exit button shuts down the program and closes all associated windows.

Toolbar Buttons

Many screens in the WinTen programs contain a ***toolbar*** at the top of the screen. The toolbar contains the buttons used to execute commands specific to that screen. The example below is the standard toolbar found in many Add and Edit screens. The following buttons are standard in every WinTen program, and most toolbars contain some or all of them.

Exit Button
The Exit button is a doorway. This button closes the current screen or window and returns you to the program's Main Menu screen or to the previous screen or window.

Add Button
The Add button is a plus sign. This button adds a new record to the current database. After you click the Add button, the program allows you to enter the appropriate information for the record that you are adding.

In some cases, this button starts a ***wizard*** (described later) for adding a new record to the database.

Delete Button
The Delete button is a minus sign. This button deletes the currently selected record from the database. In most cases, the program prompts you to confirm your intent to delete that record. This is a safeguard to prevent accidental loss of data. Once you have deleted a record, you cannot bring it back - there is no "undo" feature in WinTen programs.

Edit Button
The Edit button is a pencil eraser in action. Many data screens in WinTen programs are "locked" when you first open them. They display data but do not respond to any attempt to change it. This is a safeguard to prevent accidental loss of data. The Edit button "unlocks" the currently selected record and allows you to enter updates or changes.

Hint: Edit Mode and View Mode

When a record is editable (usually after you click the Edit icon), it is in edit mode. When it is not editable (before you click the Edit icon, or after you edit data and click the Save icon), it is in view mode.

Save Button
The Save button is a floppy disk. After editing or entering data, click this button to save your work on the currently selected record to the database.

Cancel Button
The Cancel button is a circle with a line through it. This button allows you to abandon any changes you have made to the currently selected record. In many cases, the program will prompt you to confirm your cancellation. This is a safeguard to prevent accidental loss of data.

Previous Button
The Previous button is a left-pointing arrow. Clicking on this button takes you to the previous record in the current database.

Next Button
The Next button is a right-pointing arrow. Clicking on this button takes you to the next record in the current database.

Print Button
The Print button is a picture of a printer. If you are in the Reports screen of a program, this button opens the Print Report dialog box to print the currently selected report. If you are in any other screen, this button opens a drop-down menu that allows you to select and print a report that is relevant to that screen.

Print Preview Button
The Print Preview button is a sheet of paper with a starburst behind it. This button opens a screen that shows you what your document would look like if you chose to print it. This feature allows you to make sure that your print job is correct without using paper for a test print run.

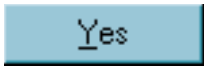
Search Button
The Search button is a flashlight. It saves you time by opening a Search screen which contains a table of all the records in the current database. Use this Search screen to find the desired record instead of scrolling through records one at a time with the Previous and Next icons.

Report Generator Button
The Report Generator button is an open book. This icon accesses the user-defined data fields for the current database. For more information, see the Tenmast Custom Report Generator manual. If your agency does not use this program, this icon has no effect.

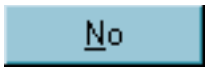
Other Standard Buttons

The following buttons appear throughout the WinTen programs. They allow you to make choices on screens and in dialog boxes.

OK and Yes Buttons
Click the OK or Yes button if you want to accept the data presented or continue the action you started. Some dialog boxes - those that only display information without giving you command options - have OK buttons that close them when clicked.



Cancel and No Buttons
Click the Cancel or No button if you want to abandon the current screen or the action you started.



Grayed Out Options

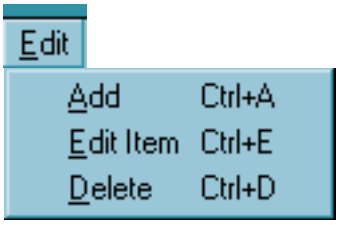
Some controls, buttons, or data fields may appear light gray rather than appearing with their normal full-color images (these buttons are colorized in the WinTen programs, even though they may appear in black-and-white in this manual). We refer to this condition as “grayed out.” This indicates that those options are disabled and cannot be accessed at the present time. Grayed out options return to their normal colors and become accessible again once the program reaches a set of conditions that allows the option to work again.

For example, when you initially enter an Edit/Review screen to review data, the Save button is grayed out (because you have not made any changes that need to be saved). Once you click the Edit button and edit the data on the screen, the Save button becomes active, returning to full color. You can then use the Save button to save your changes.

Save button grayed out

Save button active

Pull-Down Menus



Pull-down menus are located above the toolbar and consist of one or more words, each with one letter underlined. A pull-down menu is another way to access the functions on the toolbar, and some pull-down menus contain additional options that are explained in each program's documentation.

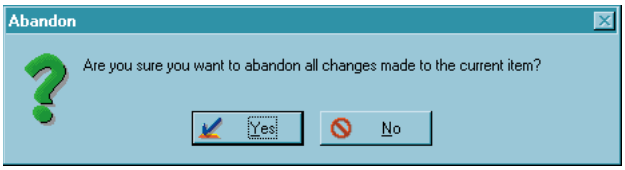
To open a pull-down menu, either click the word or press <Alt+(the underlined letter of the word)>. For example, to open the Tools menu shown to the right, you would press <Alt+T>. When the menu opens, it displays a list of commands that you can execute, as shown to the right.

The open pull-down menu to the right contains standard options such as Next Item, Previous Item, and Search. It also contains additional commands that are specific to the Tenant Accounts Receivable program, the program in which this particular pull-down menu appears.

To execute pull-down menu commands with the mouse, click on them. You can also use the keyboard to access the menu options in two ways:

1. Use the <up arrow> and <down arrow> keys to move focus to the desired option, then press <Enter> to execute it.
2. Some commands have a keyboard shortcut, shown to the right of the menu option (see Keyboard Shortcuts, above). These keyboard shortcuts can be used at any time, even if the pull-down menu is not open. Note that many of the options that have keyboard shortcuts have corresponding toolbar buttons.

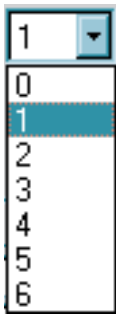
Dialog Boxes



Occasionally, a small window appears on top of the screen in which you're currently working. This is called a ***dialog box***. The contents of dialog boxes vary. Some contain pertinent information and have a single button which makes them disappear, while others allow you to specify options for a procedure that you've told the program to perform.

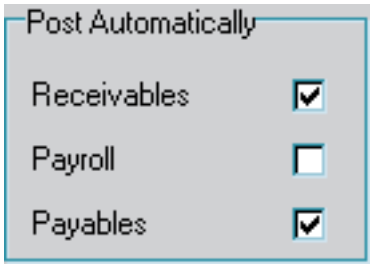
Drop-Down Selection Boxes

Some screens have a data entry field with a small black downward-pointing triangle to its immediate right. Clicking on this triangle opens a small list of pre-set options for that data field's contents. This is known as a ***drop-down selection box***. Click an option to select it.



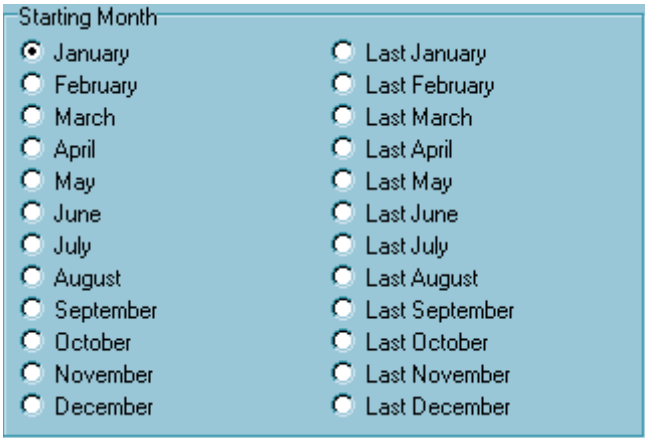
Check Boxes

A small white box like the one shown to the right is a check box. Click in the box to "check" or "uncheck" it. Check boxes are used just like check boxes on pencil-and-paper forms - they are simple yes-no conditions. In the example at right, Receivables and Payables are checked and Payroll is unchecked.



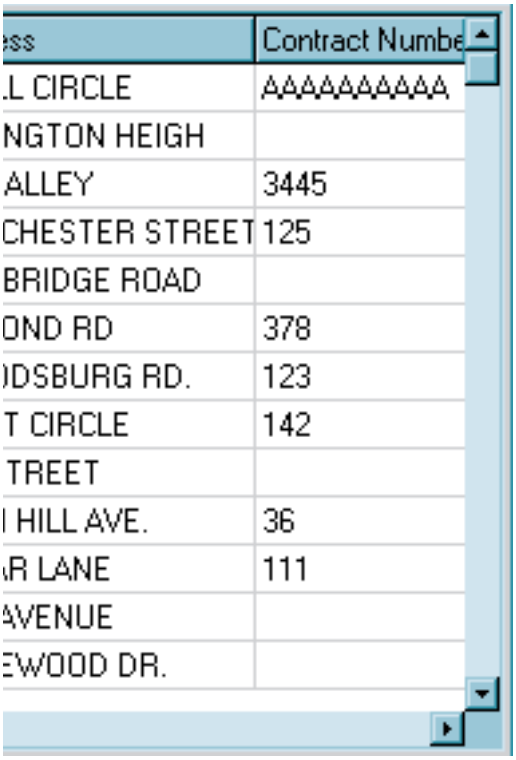
Radio Buttons

A cluster of small white circles, each with a label, is a set of radio buttons. They have this name because they work in a manner similar to the preset station buttons on your car radio - you can only have one radio station, or one radio button, selected at a time. To select a radio button, click on it and a black dot will appear in the circle. Radio buttons are used when you have two or more choices but only one of those choices applies at any given time.



Scrollbars

Many times, a table of records holds more records than the program can fit on the screen. The scrollbar is found on the right edge of the table. To move up or down through the table, click on the small black triangles at the top and bottom of the scrollbar. The small box between the triangles is a rough indicator of where you are within the table; think of it as being similar to an elevator's display that shows how close to the top or bottom of the building the car is.

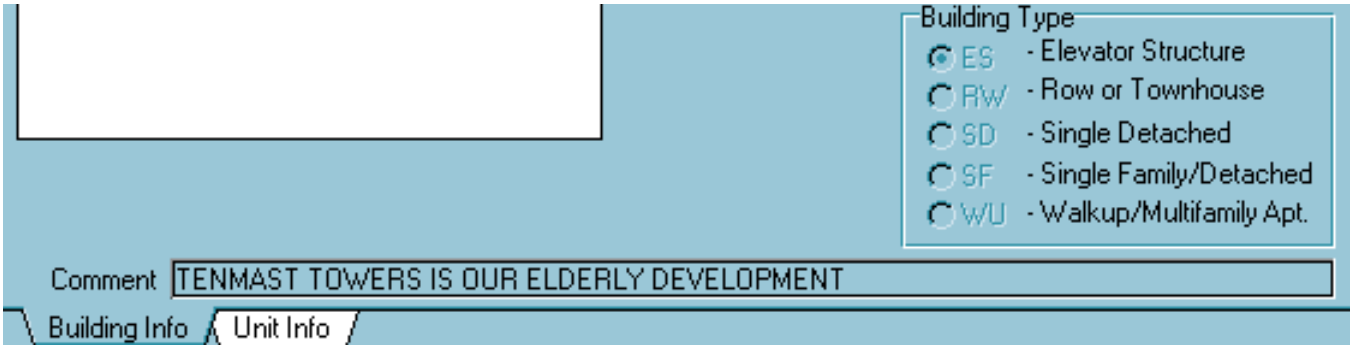


Some tables also have horizontal scrollbars if they contain more information than will fit across the screen. Use the small black triangles at the bottom left and right corners of the table to move from side to side within it.

NOTE: Some drop-down selection boxes have vertical scrollbars if they have more options than will fit in the selection box when it is open. These function in exactly the same manner as the scrollbars on tables of records.

Tabs

Some screens have large amounts of information that must be divided so that it is easier to track and access. In the WinTen programs, these screens are divided into tabs, which are so named because they resemble the index tabs on file folders. Clicking on a tab changes the data displayed on the screen and the toolbar options available.



Function Keys

Across the top of your keyboard is a set of twelve keys designated <F1> through <F12>. These are the function keys. Currently, only <F1> and <F9> have functions in the WinTen programs.

F1 Key (Help)
Pressing <F1> opens a Help dialog box for the program. Help is context-sensitive; the Help information shown corresponds to the current field or screen in the program. The WinTen programs use the standard Windows-based help system. With this type of help, you can search for any help topic, print the current topic, mark a specific topic using a bookmark, or jump to another help screen by clicking the underlined keywords.

F9 Key (Change Password)
Pressing <F9> is equivalent to clicking the Change Password button. This only works when you are at the Main Menu of a program in which Tenmast Security is active.

Program Overview

The WinTen WorkOrder program is designed to allow public housing authorities to track maintenance work orders from initial request to completion. It also shares data with several other Tenmast modules, which facilitates comprehensive tracking of all aspects of the facility and unit maintenance process.

Data Sharing

WorkOrder integrates directly with five other WinTen modules and indirectly with one more:

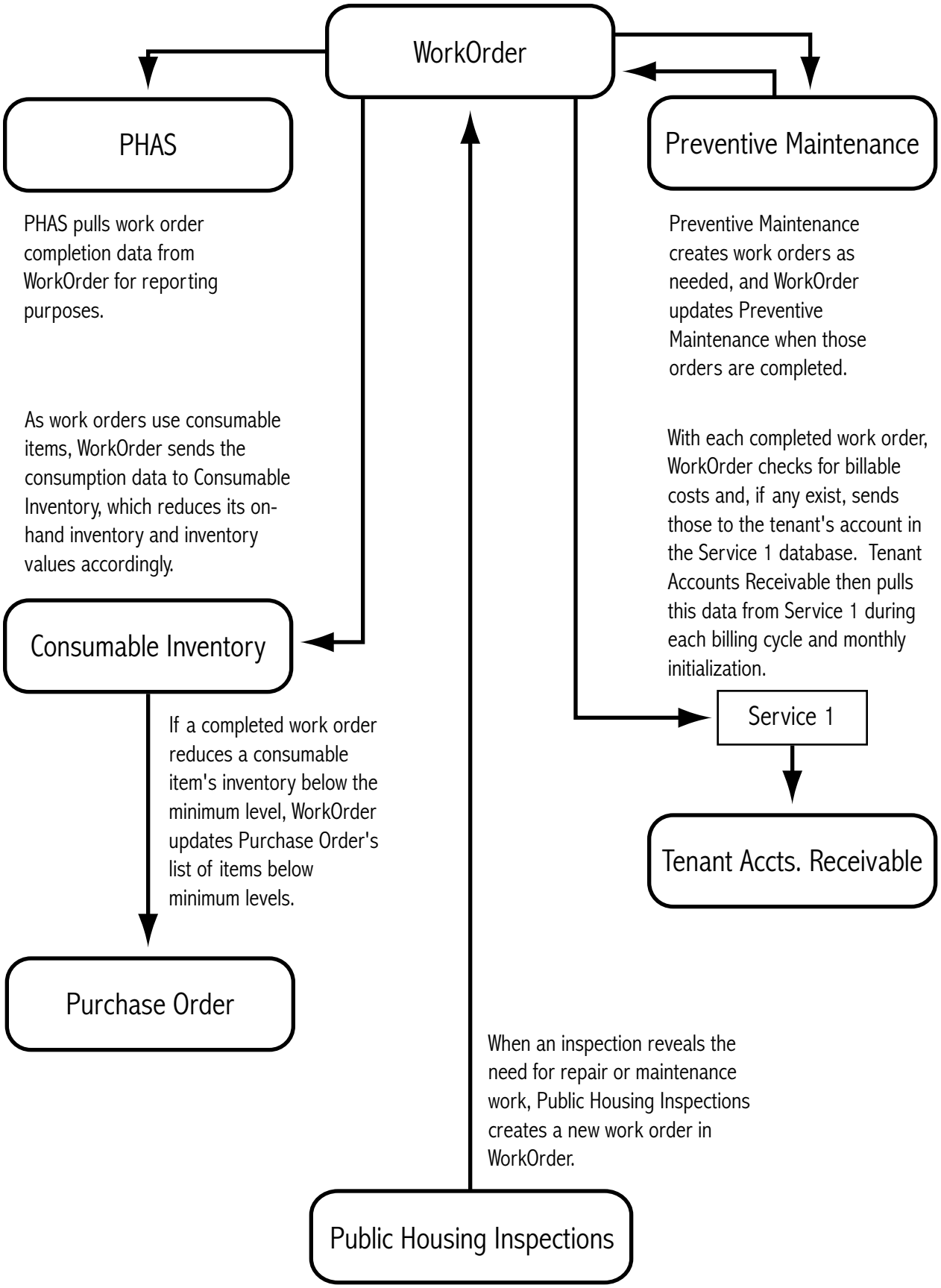
• The Preventive Maintenance and Public Housing Inspections modules can create new work orders as their individual functions identify specific needs. WorkOrder also informs Preventive Maintenance when a Preventive Maintenance-generated work order is completed.

• When a work order is completed, WorkOrder records all consumable item expenditures in the Consumable Inventory database. It then checks Consumable Inventory's minimum stock levels for those items. If any items have fallen below their minimum stock levels as a result of the completed work order, WorkOrder updates Purchase Order's list of items that are below their minimum levels.

• Additionally, on work order completion, WorkOrder checks for billable costs incurred by the tenant for that work order. If any exist, it posts these to the Service 1 database. Service 1 is used by the Tenant Accounts Receivable program, which pulls this data from Service 1 during each billing cycle and monthly initialization.

• When a user compiles work order completion data using the PHAS program, PHAS pulls this data from WorkOrder for HUD reporting purposes.

The diagram on the following page provides a graphical representation of WorkOrder's data sharing capabilities.


WorkOrder
PHAS
Preventive Maintenance
PHAS pulls work order completion data from WorkOrder for reporting purposes.
Preventive Maintenance creates work orders as needed, and WorkOrder updates Preventive Maintenance when those orders are completed.
As work orders use consumable items, WorkOrder sends the consumption data to Consumable Inventory, which reduces its on-hand inventory and inventory values accordingly.
With each completed work order, WorkOrder checks for billable costs and, if any exist, sends those to the tenant's account in the Service 1 database. Tenant Accounts Receivable then pulls this data from Service 1 during each billing cycle and monthly initialization.
Consumable Inventory
Service 1
If a completed work order reduces a consumable item's inventory below the minimum level, WorkOrder updates Purchase Order's list of items below minimum levels.
Tenant Accts. Receivable
Purchase Order
When an inspection reveals the need for repair or maintenance work, Public Housing Inspections creates a new work order in WorkOrder.
Public Housing Inspections

Cyclical Actions

At the Beginning of the Month

Review Setup. Make any necessary changes (infrequent but critical). If you are running the WinTen Consumable Inventory, Preventive Maintenance, and/or Public Housing Inspections modules, be sure they are tied into WorkOrder.

During the Month

1. Add new work orders as they come in. Start the work order immediately. Note that you do not have to have all of the data completed to start the record and begin work. The only required fields at this point are the tenant's name and address, the work requested, and the type of work order (for PHAS reporting purposes).
2. Run the Summary of Work Order Activity Report for outstanding work orders at the beginning of each work day to see what needs to be done.
3. Edit work orders that have been completed. Enter labor and materials/work information as it becomes applicable. Enter tenant charges if they apply. Complete any unfinished work order records.
4. Print work order bills from Tenant Accounts Receivable each work day. We recommend that this be done by a regular Tenant Accounts Receivable user.

At the End of the Month

1. Print any final work order bills from Tenant Accounts Receivable. We recommend that this be done by a regular Tenant Accounts Receivable user.
2. Archive completed work orders from prior years. Finished work orders should be kept at least three years for PHAS reporting.
3. Start the month again

Planning Questions

Before you begin using the Work Order program, there are a few steps that you need to take in order to ensure that your agency will have a smoothly-operating system for recording work order requests and completions.

Do you have the Consumable Inventory program, and do you want it to share data with the WorkOrder program? If so, which directory is it in? Do you want the WorkOrder program to remove items from Consumable Inventory automatically?

We recommend using the Consumable Inventory program if you have it and allow the WorkOrder program to remove items from inventory. You will answer all of these questions on the Default Settings tab of the Setup screen.

What work code items, with prescribed charges, will you be using?

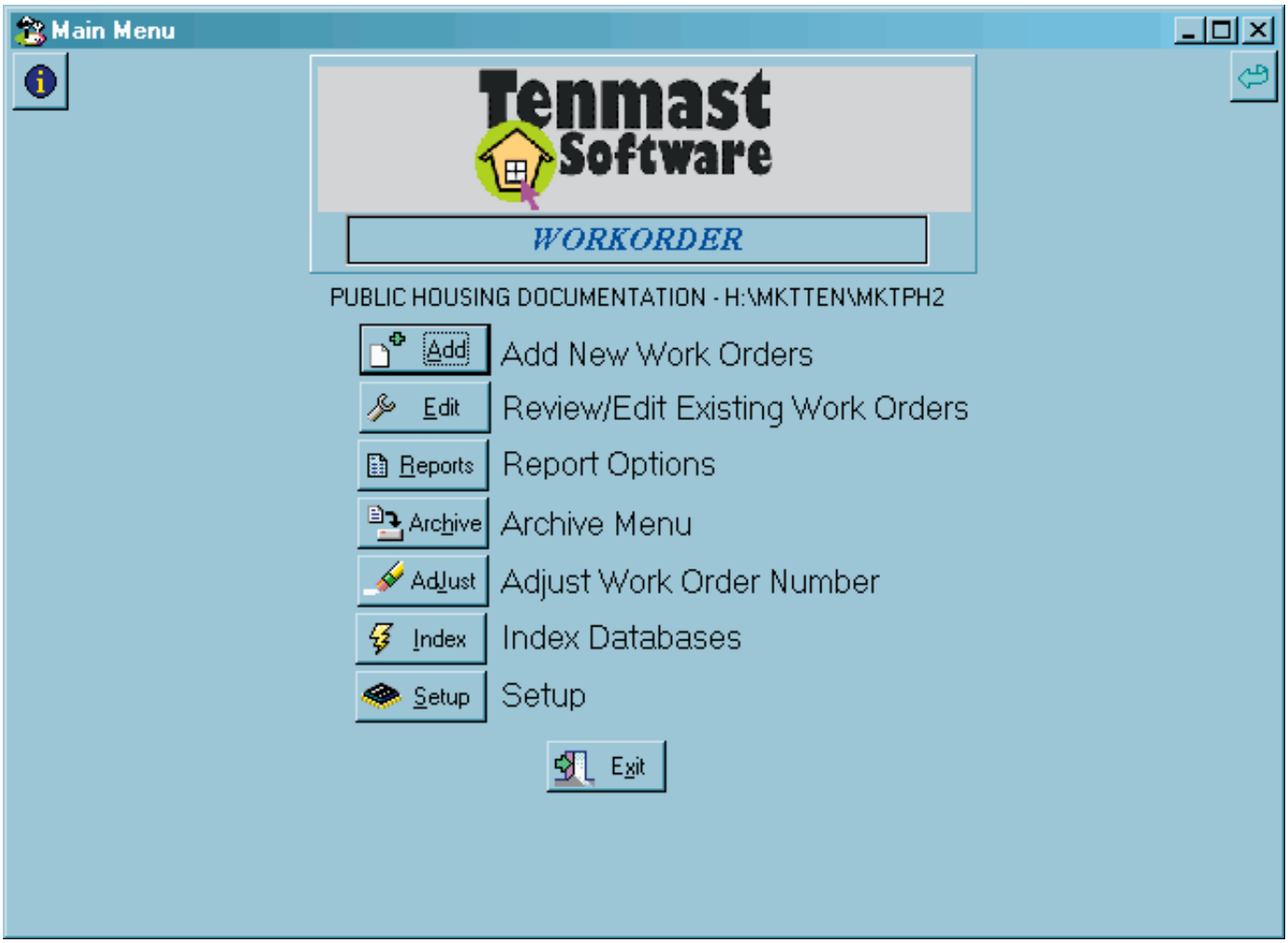
Fixed price codes are routine jobs that occur frequently and have a set charge. An example might be unlocking a door or hauling something to a landfill. Fixed price codes must always start with the letters FW. For example, a fixed price code for unlocking a door might be FWUNLOCK. You need to have as many codes as possible defined before you begin entering work orders. The master list of fixed work codes is entered on the Price Codes tab of the Setup screen.

What work code definitions will you be using?

Work code definitions are categories of work codes used to help organize your work orders. These are not the fixed work codes you defined above. Work code definitions are used to categorize the general type of labor being performed for each labor record. The master list of work codes is entered on the Work Codes tab of the Setup screen.

Main Menu

The Main Menu is the starting point for using each function of the WorkOrder program. This manual details each of these functions in its respective chapter.

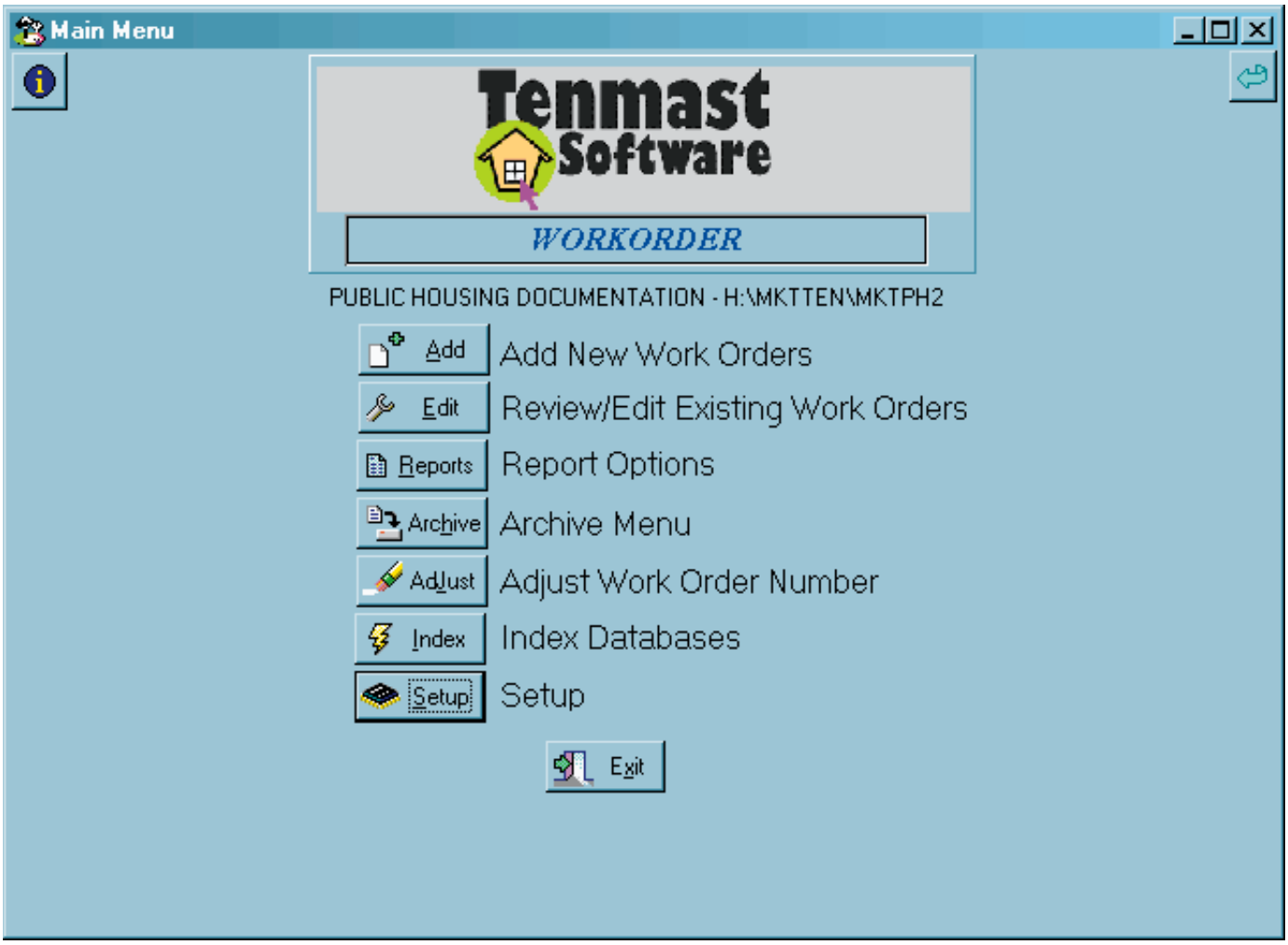


Setup

The first time you run WorkOrder, the first option you should select from the Main Menu is Setup. All WinTen programs have Setup functions. The settings in the Setup screen control the program environment, and you can change many aspects of the program's operation through these settings. Be careful to enter the proper information, as inaccurate settings can cause WorkOrder to function in an unexpected manner.

The individual in charge of your WinTen programs should periodically review each program's Setup to ensure that it is still correct. Access to the Setup screen should be restricted through the Tenmast Security program after the initial settings have been entered in order to prevent accidental changes to the settings.

To use the Setup functions, click the Setup button or press <S> at the Main Menu.

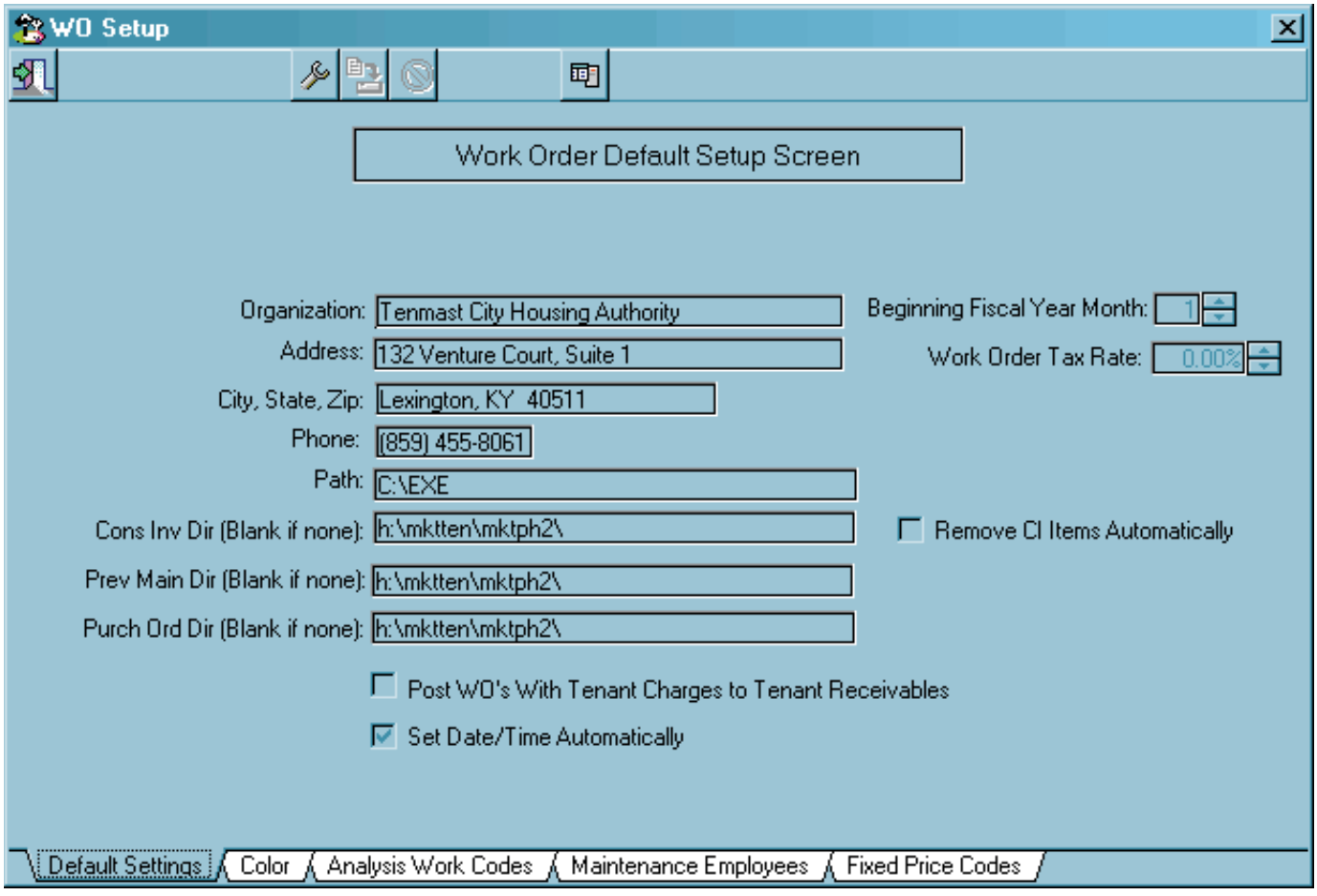


Setup Screen

The Setup screen has five tabs: Default Settings, Color, Work Codes, Maintenance Employees, and Fixed Work Codes. You enter the Setup screen by clicking the Setup button or by pressing <S> at the Main Menu. The Setup screen opens on the Default Settings tab, shown below.

Default Settings Tab

This tab contains your agency's address information, as well as the file paths used to tie your WorkOrder program to the Consumable Inventory, Preventive Maintenance, and Purchase Order programs. Use the standard WinTen controls to edit the data on this screen and save or cancel your changes.

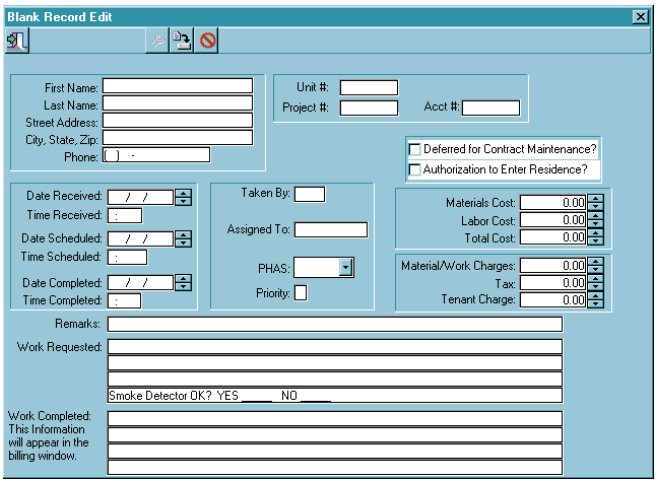


Default Settings Tab Controls

Blank Record Edit Button

Clicking on this toolbar button opens the Blank Record Edit sub-screen. This sub-screen contains a template for a blank work order record. You may edit this template to add data that should be on every work order that the program prints. For example, you might want maintenance personnel to check the smoke detectors when they complete a work order. You could include, in the Remarks field of the blank work order, the following, which would be added to all new work orders:

Smoke Detector OK? __ Yes __ No



Default Settings Tab Data Fields

Organization

Enter your housing authority or organization name as it should appear in the header of all WorkOrder reports.

Address

Enter your housing authority or organization address.

City, State, Zip

Enter your city, state, and zip code.

Phone

Enter the phone number of your organization as it should appear on all forms that WorkOrder prints.

Path

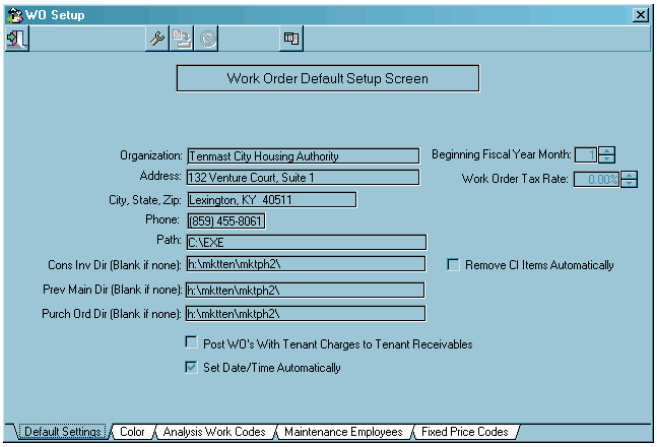
This is the path the program uses to find critical files during program execution (the directory in which your Tenmast executable files are stored). Do not change this field without contacting Tenmast Training & Support.

Cons Inv Dir

This is the directory where the Consumable Inventory (CI) databases are stored. It is used to tie in Consumable Inventory items from the CI database. We do not recommend you change this field without contacting Tenmast Training & Support.

Remove CI Items Automatically

If this box contains a check mark and the CI Directory field is filled in, any materials you use from Consumable Inventory will be automatically removed from the CI database and the database amounts updated. Otherwise, you will be able to use items from Consumable Inventory but they will not automatically be removed and balances will not be updated.


WO Setup
Work Order Default Setup Screen
Organization: Tenmast City Housing Authority
Address: 132 Venture Court, Suite 1
City, State, Zip: Lexington, KY 40511
Phone: (859) 455-8061
Path: C:\EXE
Cons Inv Dir (Blank if none): h:\mktten\mktph2\
Prev Main Dir (Blank if none): h:\mktten\mktph2\
Purch Ord Dir (Blank if none): h:\mktten\mktph2\
Beginning Fiscal Year Month:
Work Order Tax Rate:
Remove CI Items Automatically
Post WO's With Tenant Charges to Tenant Receivables
Set Date/Time Automatically
Default Settings
Color
Analysis Work Codes
Maintenance Employees
Fixed Price Codes

Prev Main Dir
The Prev Main Directory is the directory where the Preventive Maintenance (PM) databases are stored. When a PM-generated work order is completed, WorkOrder will update the Preventive Maintenance item with the completed information from the work order. We do not recommend you change this field without contacting Tenmast Training & Support.

Purch Ord Dir
The Purch Ord Directory is the directory where the Purchase Order (PO) databases are stored. Whenever WorkOrder reduces inventory amounts in the Consumable Inventory database, and the item is reduced below minimum inventory levels, it will record an entry in PO for reporting items below minimum level. We do not recommend you change this field without contacting Tenmast Training & Support.

Post WO's With Tenant Charges to Tenant Receivables
If you have the Tenmast Tenant Accounts Receivable program, you may automatically post all completed work orders with tenant charges to the Service 1 database by placing a check mark in this box. Service 1 is used during Tenant Accounts Receivable billing and initialization cycles to post any work order charges to the tenant's account. If this is does not contain a check mark and you have the Tenant Accounts Receivables program, you will have to manually add any work orders charges in the Tenant Accounts Receivable program. For more details on this process, see your Tenant Accounts Receivable manual.

Set Date/Time Automatically
If you check this box, the computer's system date and time will be inserted into the Date Received, Time Received, Date Scheduled, and Time Scheduled fields every time a user enters a new work order. If this box is not checked, the user will have to fill in these fields each time.

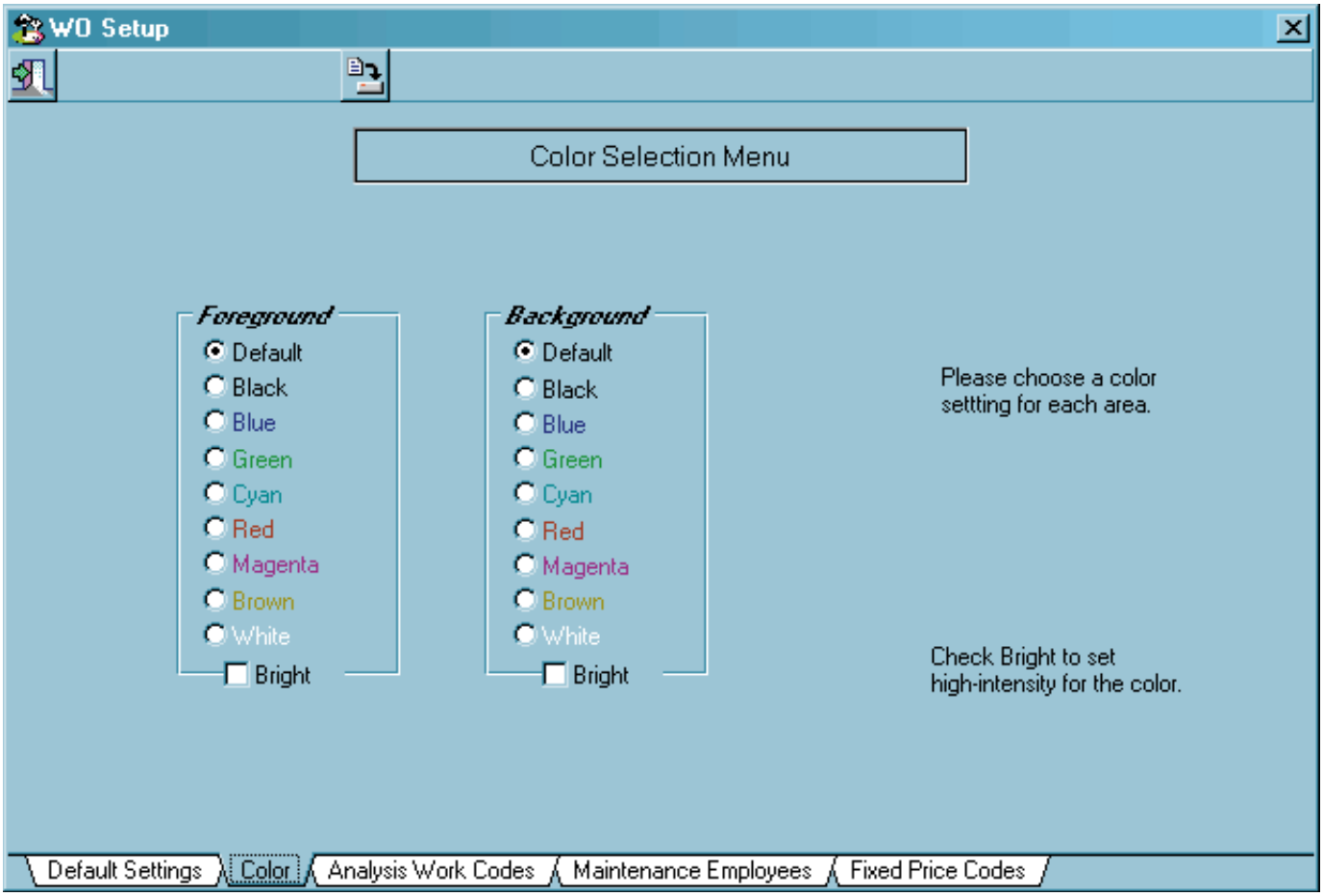
NOTE: These date and time fields are required for PHAS tracking purposes. They must be completed in the work order record.

Beginning Fiscal Year Month
Enter the month that begins your fiscal year. This will be used for PHAS records.

Work Order Tax Rate
Enter the tax rate you apply to work order tenant charges. If you do not charge tax, leave this at 0.00% and tax will not be applied to the work order.

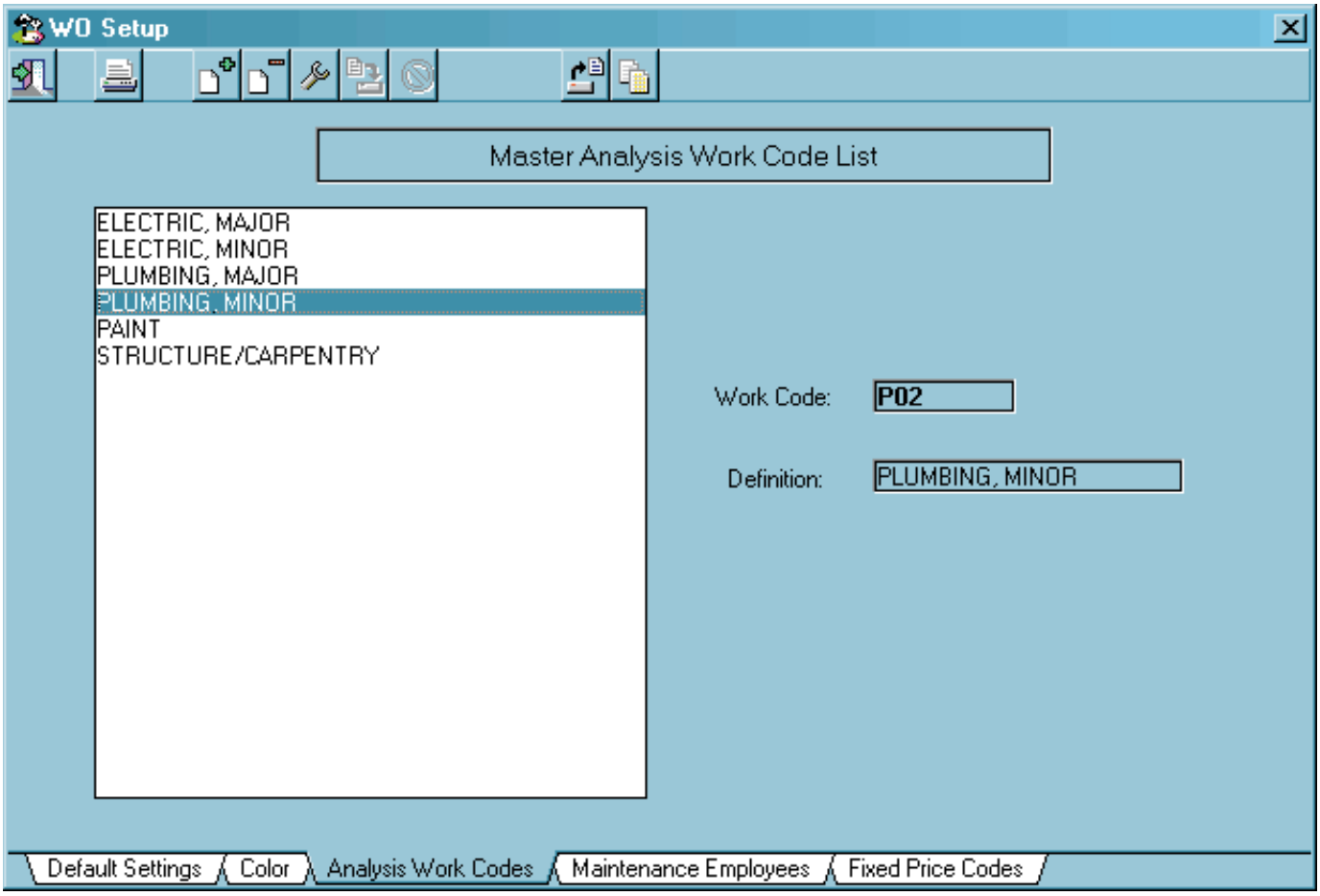
Color Tab

The Color tab allows you to set the colors used in WorkOrder's screens. The Foreground set of radio buttons sets text color, while the Background set of radio buttons sets the color of the background. Use the standard WinTen controls to edit the data on this tab and save or cancel your changes.



Analysis Work Codes Tab

The Analysis Work Codes tab is used to create work order categorization codes for analyzing your maintenance operations. Each time a user creates a labor record on the Labor tab of the Work Order Edit screen, he will choose a work code to assign to that labor record. This allows your agency to identify the general type of work that was performed on the work order. The WorkOrder program tracks the work code occurrences by month and year.



Analysis Work Codes Tab Controls

Purge Totals Button

This button allows you to purge work codes that are no longer in use. Each time you use a work code on a labor record, the work code is stored in a database. Over time, your agency may stop using specific work codes. For example, a "general electrical work" work code may fall out of use as maintenance personnel start using "major electrical work" and "minor electrical work" instead. However, the "general electrical work" code will still show up on all analysis work code reports that you run. The Purge Totals button sets the totals for all work codes to zero for a selected year. When you click this button, the Purge Work Codes for a Specific Year dialog box opens. Select the year whose totals you want to purge and click OK.

NOTE: The Purge Work Codes for a Specific Year dialog box will not allow you to purge the current calendar year's work codes. This prevents you from deleting your most recent work statistics.

Reconstruct Analysis Work Codes

Each time a work code is added to a work order's record, it is also added to WorkOrder's database of work code occurrences. Over time, this database can develop inconsistencies, most often as a result of incomplete or deleted work orders or purged work codes. The Reconstruct Analysis Work Codes button starts a process that purges and recreates this database. The program searches every existing work order labor record and recalculates the monthly and annual totals for work code occurrences.

Analysis Work Codes Tab Data Fields

Work Code

The Work Code is the actual code used to identify a type of labor. A work code can be up to five characters long. For ease of use, we recommend that you plan the full set work codes you will use before entering them, rather than creating new codes as you need them.

Definition

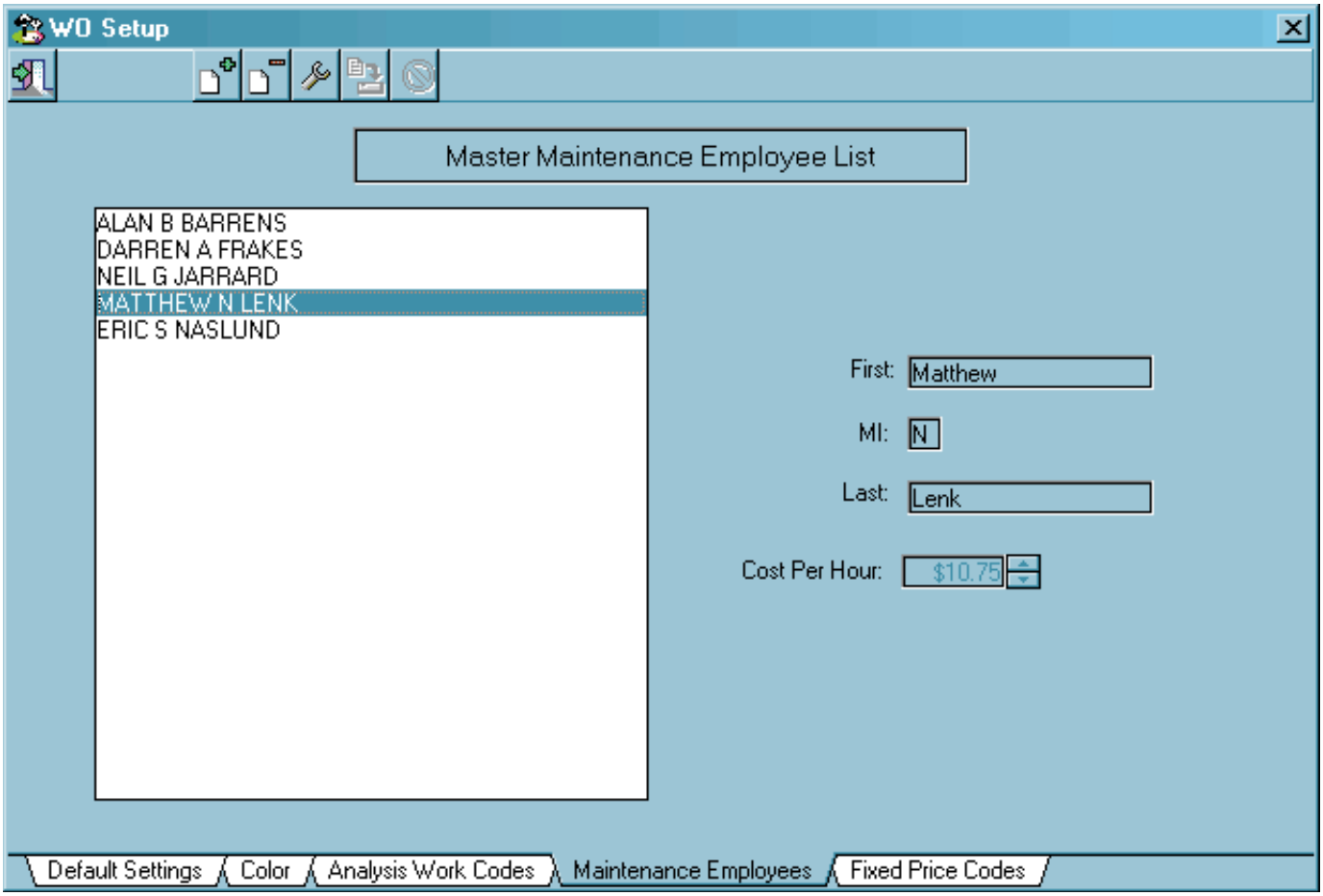
This is the description for the work associated with the work code. The definition can be up to 20 characters long.

Maintenance Employees Tab

Each time you add a labor record to a work order, you must also assign an employee to the record. This allows you to track which employees completed each work order. The Maintenance Employees tab allows you to create your master list of all employees. Whenever you add an employee to a labor record, the program automatically pulls that employee's hourly labor cost from this list and calculates labor costs.

NOTE: If employees are allowed to work overtime at different wage rates, the program will not take that into account. For each employee who works overtime, you should create a second employee record with the overtime labor cost. In the example screen, records for employee overtime are indicated with (OT).

Use the standard WinTen controls to add, edit, or delete employee records and save or cancel your changes.



Maintenance Employees Tab Data Fields

First
This is the first name of the maintenance employee.

MI
This is the middle initial of the maintenance employee.

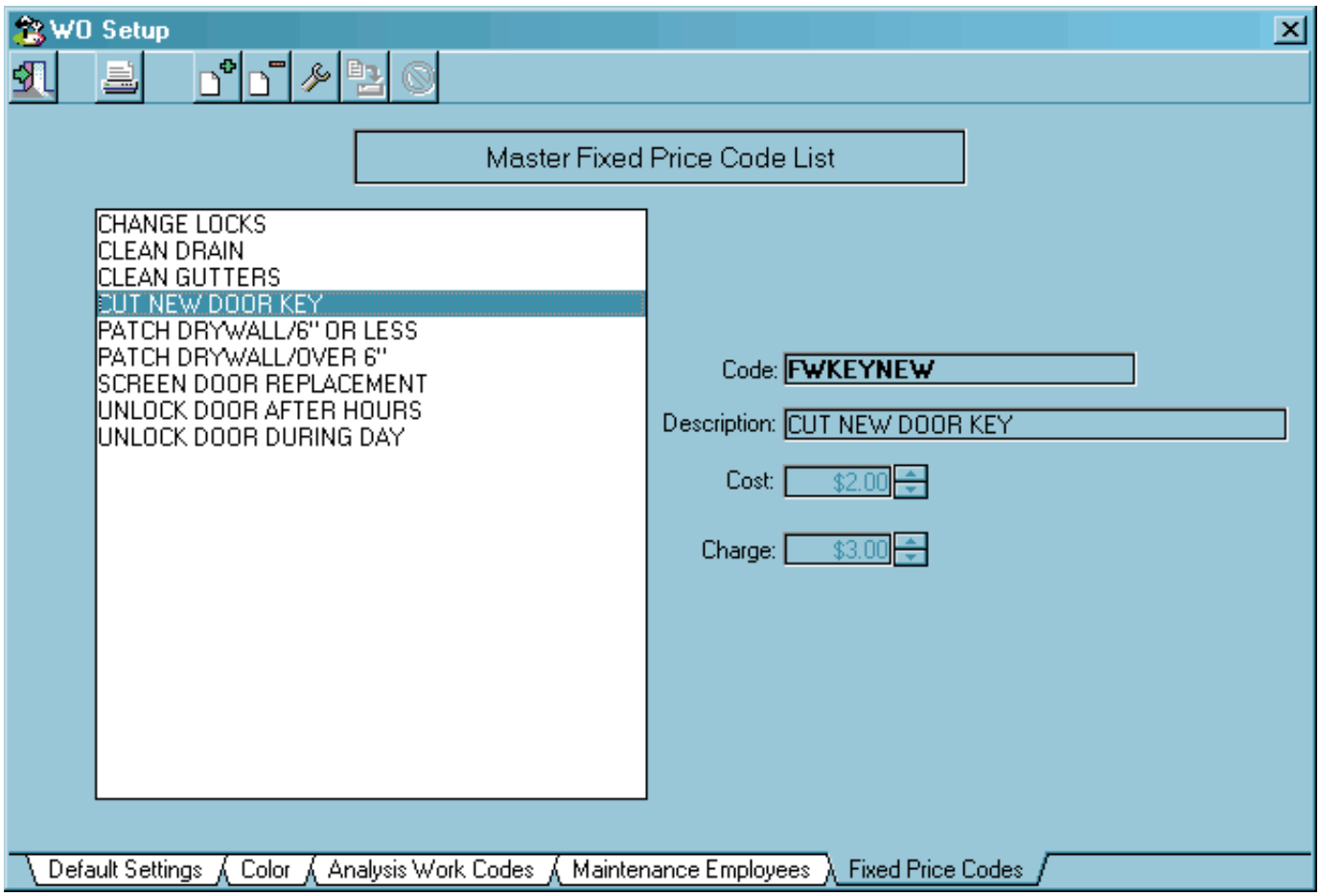
Last
This is the last name of the maintenance employee.

Cost per Hour
Enter the cost per hour for the maintenance employee. Note that the cost per hour is not the employee's hourly wage. The cost per hour is the hourly cost to the housing authority, including not only wages but benefits, insurance, and any other financial considerations. This allows your agency to track the costs that this employee's work incurs.

Fixed Price Codes Tab

The Fixed Price Codes tab is used to set standard cost and billing information for tasks that occur frequently and have a set charge and/or cost. These may be periodic maintenance jobs, like gutter or drain cleaning, or they may be tenant-requested tasks like key duplication or door unlocking. When a work order involves one of these tasks, a user can record the task on the Materials tab of the Work Order Edit screen as if it were a consumable item expenditure. Fixed price codes must begin with the letters “FW” to distinguish them from consumable items on the work order.

Use the standard WinTen controls to add, edit, or delete records and save or cancel your changes.



Fixed Price Codes Tab Data Fields

Code
This is the unique identifying code for the task. The first two letters of this code must be "FW."

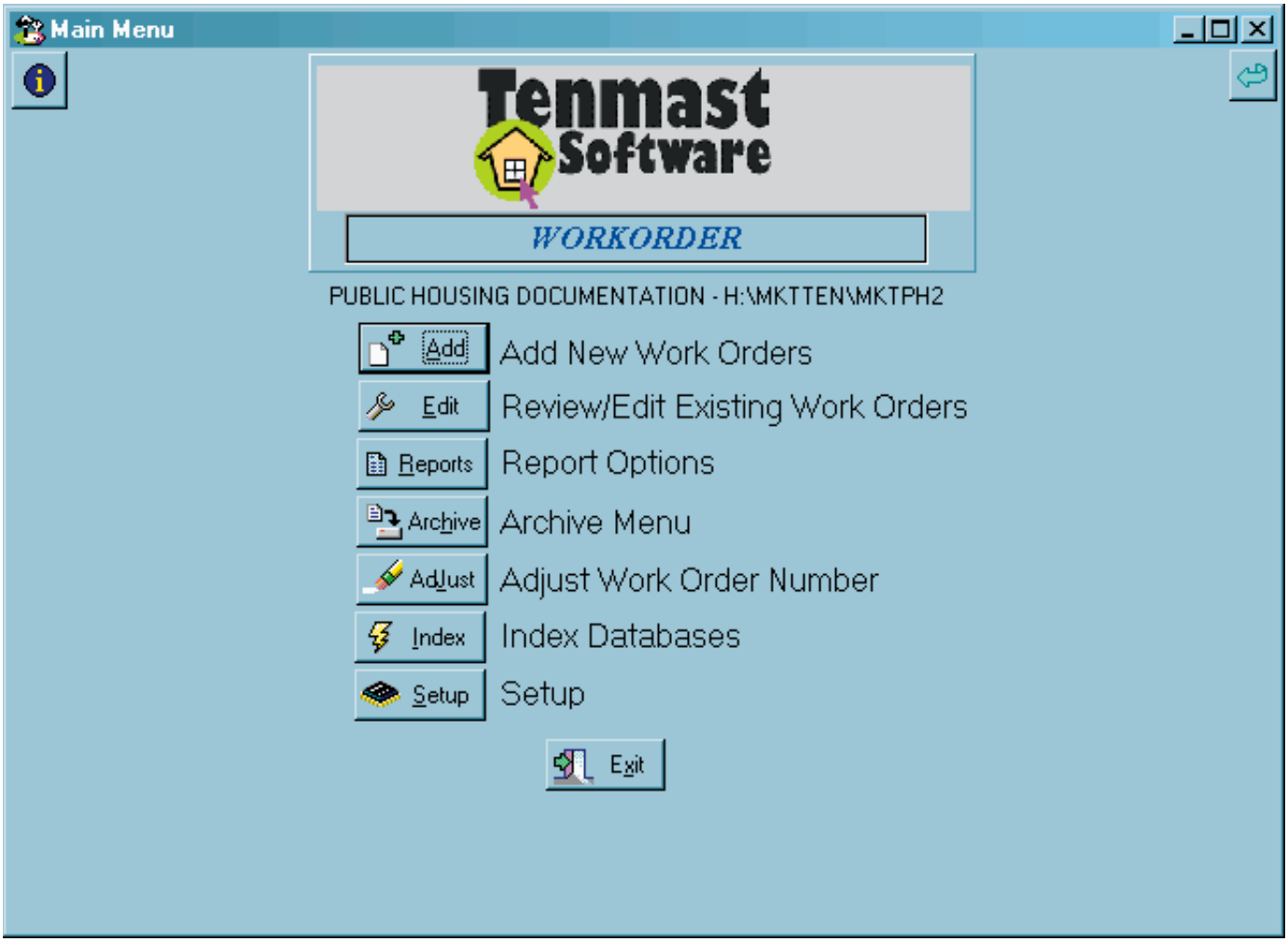
Description
Enter the description of the work.

Cost
This is the cost that your agency incurs when performing this work. This should not include the cost of items from your consumable item inventory that will be used to complete the work. For example, making a duplicate key costs your agency $2 because you do not stock blank keys and must go to the local hardware store to have the key duplicated. In this instance, you would set the cost to $2. However, if you do stock blank keys and your maintenance shop has a key duplication machine, you would not enter any cost. Instead, when the work order is completed, the user should record the consumption of one blank key from your agency's consumable item inventory by adding another material item for the key.

Charge
This is the charge billed to the tenant for the work in question. This should be set according to housing authority policy. This is the amount that the tenant will be charged for the work order. It does not have to correspond to your cost. For example, opening an apartment that a tenant has locked himself out of may not actually cost your housing authority anything except a couple of minutes, but you may choose to charge tenants $10 per unlocking to encourage them to be responsible with their keys.

Add New Work Orders

Once you have configured your system, you are ready to begin adding work orders. To add a work order, click the Add button or press <A> at the Main Menu.



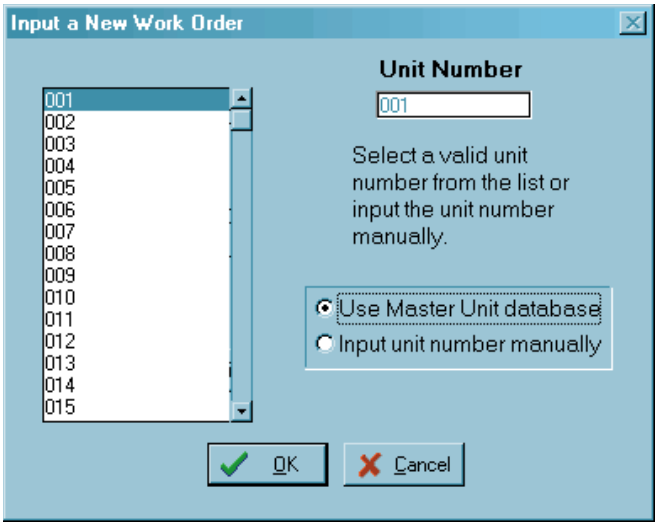
Input New Work Order Dialog Box

When you begin the work order addition process, the first thing to appear is the Input New Work Order dialog box. This allows you to select the unit on which the work is being performed. If the unit's number is not listed, or if the work is not being performed on a unit, select the Input Unit Number Manually radio button. The Unit Number data field becomes editable. You can enter a unit number or a 12-character description of whatever is receiving the work ("office," "playground," "agency van," etc.) in this field.

Once you have selected the unit or entered something in the Unit Number field, click the OK button. The dialog box closes and the Review Screen opens on the Main tab.

Caution

If you select an unoccupied unit for this work order, the work order will be added as a VACANT work order. If you need to apply charges to a previous tenant, you may only do so if the tenant is still in Tenant Accounts Receivable as a Z-unit. To apply any charges to a previous tenant, you must choose "Input Unit Number Manually" and enter the Z-unit number as the unit number to use.



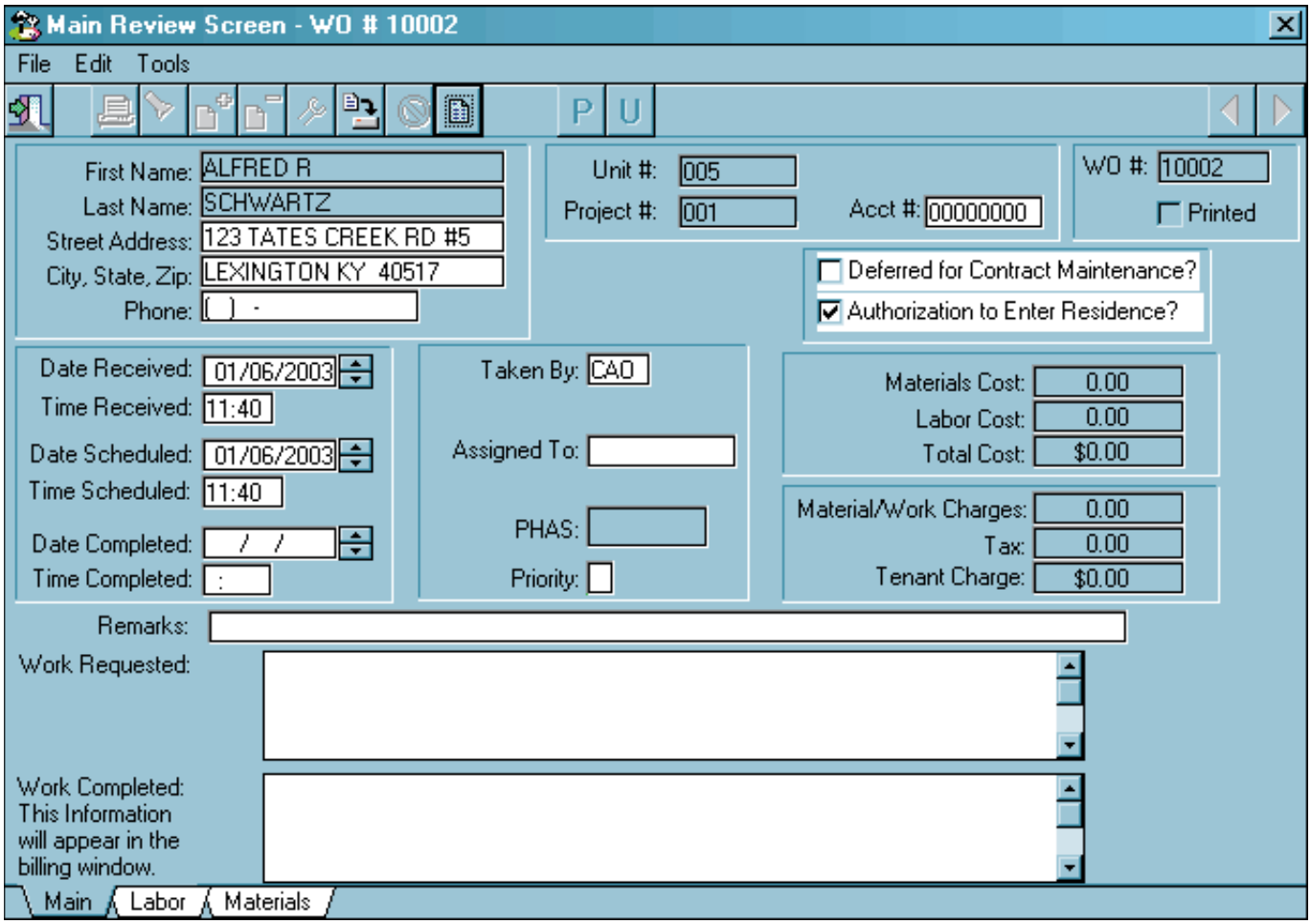
Hint

When adding work orders, you have several options for unit number entry:

1. *Pick a valid unit from the list, which contains the units that WorkOrder draws from Tenant Accounts Receivable.*
2. *If you need to add a work order for a tenant who has moved out but is still in Tenant Accounts Receivable as a Z-account, select the "input unit number manually" radio button. This allows you to manually enter the unit number in the data field above. You should enter the Z unit from Tenant Accounts Receivable (e.g. "Z101").*
3. *You can select the "input unit number manually" radio button and type anything you want in the Unit Number field. Use this for work orders for offices, garages, laundry rooms, agency vehicles, and anything else that isn't a unit.*
4. *You can select the "input unit number manually" radio button and leave the Unit Number field blank.*
5. *You can select the "input unit number manually" radio button and type a valid unit number for Tenant Accounts Receivable. The program will display a message that you have selected a unit that is in the Master Unit database, and will ask if you want to link to the unit. If you answer No, you will be able to type the tenant's name, address, etc. on the work order. If you answer Yes, the info from Tenant Accounts Receivable will be added to the work order for you.*

Review Screen

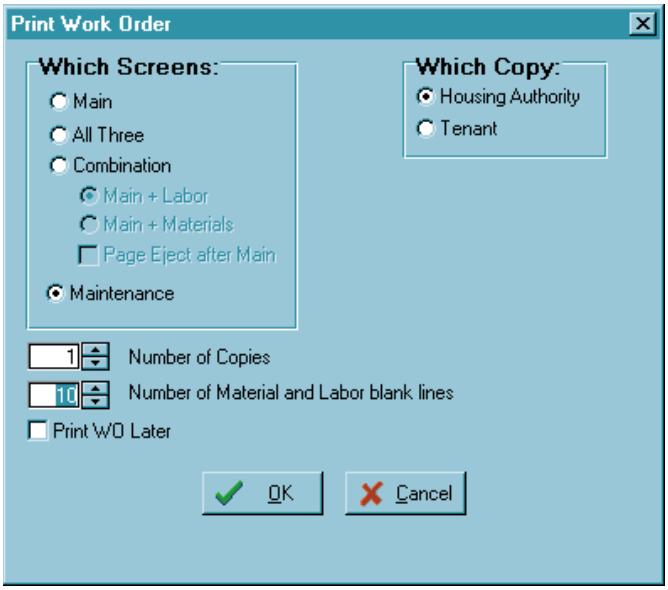
The Review screen contains all of the data for one work order. This screen has three tabs: Main, Labor, and Materials. It always opens on the Main tab.



Printing in the Review Screen

The Print toolbar button, shown to the right, operates in a slightly different fashion on the Review screen of WorkOrder than it does in most WinTen programs. On all three tabs of this screen, the Print button opens the Print Work Order dialog box.

Print Work Order Dialog Box



The Print Work Order dialog box allows you to print the currently selected work order while you are in the process of editing or reviewing it. You can use this function at any point during the work order's life cycle, whether you are initially adding it, revising it, or recording the work's completion. This dialog box provides you with a variety of printing options:

Which Screens
This set of radio buttons allows you to select what data from the work order will be printed. You can select the data from the main tab, from all three tabs, from the main and labor tabs, from the main and materials tabs, or a maintenance printout. The maintenance printout contains data from all three tabs, along with blank lines for maintenance personnel in the field to record labor and materials information.

Which Copy
This pair of radio buttons allows you to specify whether the printed work order is intended for internal or tenant use. A housing authority copy contains information on both costs and charges. A tenant copy only contains information on charges to the tenant.

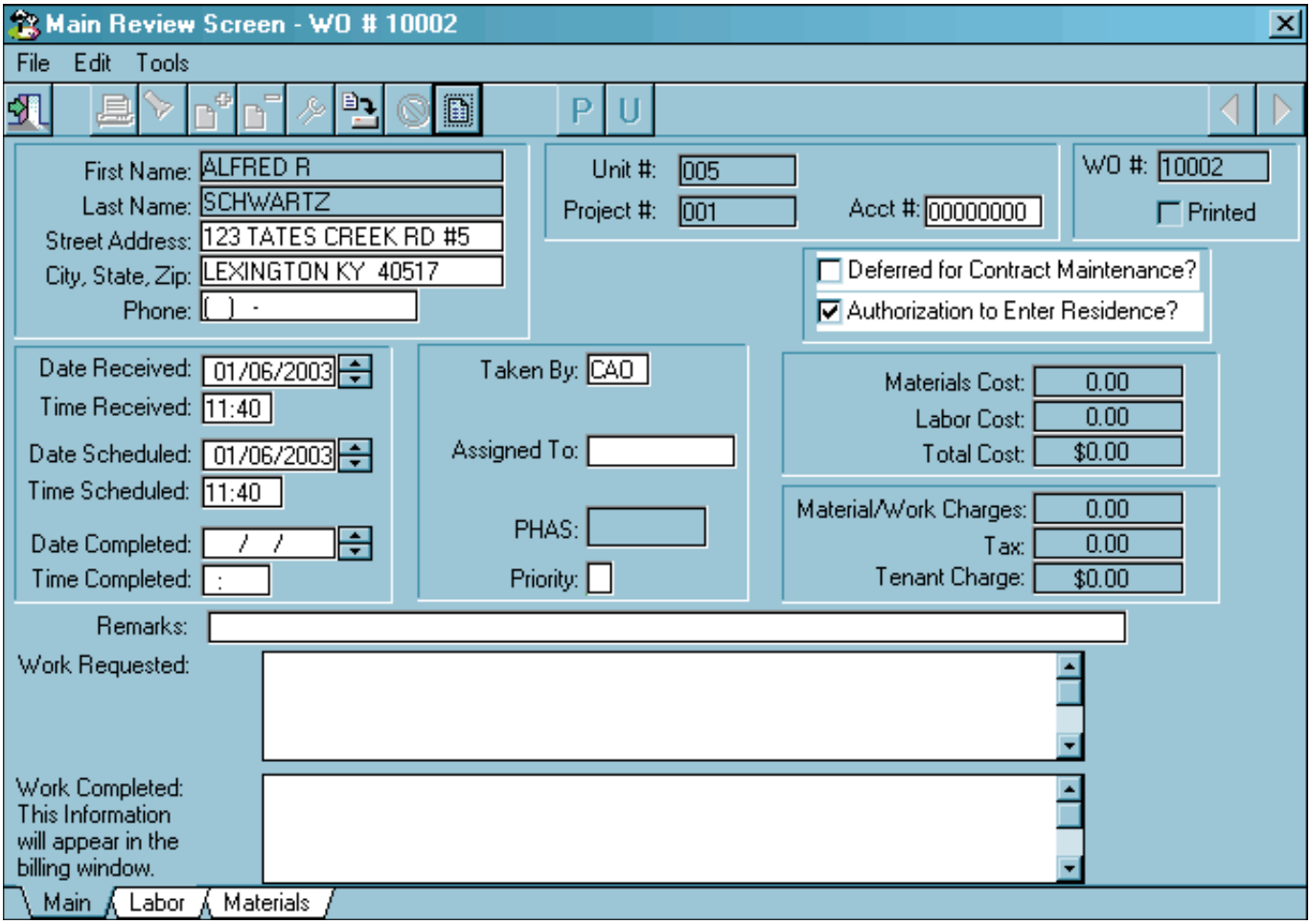
Number of Copies
This data field allows you to select how many copies of the work order will be printed.

Number of Material and Labor Blank Lines
This data field allows you to select how many blank lines will be printed on the maintenance copy of the work order for recording labor and materials information. It is only visible if you have selected the maintenance copy in the Which Screens set of radio buttons.

Print WO Later
Normally, the work order will be printed as soon as you click the OK button. If you check this box, the work order will not be printed but will be saved in a database. If you choose to do this, you will need an additional program which will print the work orders from the databases - WorkOrder will not print these. This option is usually used only for remote sites that do not have printing capability.

Main Tab

The Main tab contains the general scheduling and cost/charge data for the work order. Enter your data and use the standard WinTen controls to save your changes.



Main Tab Controls

Change Unit Number Button

The Change Unit Number button opens the Input a New Work Order dialog box again. This allows you to change the unit number to which the work order is linked.

PHAS Button

The PHAS button opens the PHAS Information dialog box. This dialog box contains the PHAS reporting information for the work order. If the unit to which the work order is linked is in the Master Unit database, the program will fill in most of these data fields automatically and you will be unable to edit them.

PHAS Information Dialog Box

The PHAS Information Dialog Box contains all PHAS reporting information for this work order.

PHAS Information Dialog Box Data Fields

PHAS Code

This drop-down selection box allows you to set the PHAS code for tracking this work order. This field is required. The following are your options:

RGN Resident-Generated Non-Emergency

RGE Resident-Generated Emergency

MGN Management-Generated Non-Emergency

MGE Management-Generated Emergency

AIN Annual Inspection Non-Emergency

AIE Annual Inspection Emergency

SID System Inspection Deficiency

CGW Cyclical Generated Work Order

VFW Vacancy Fix-Up Work Order

DFM Deferred For Modernization

Total Number of Days Active

This is the number of days the work order is active, determined by the work order's Date Received and Date Completed. It is a measurement, in days, of the time required to complete this work order. This number is used on the PHAS report to calculate the Total Days to Complete Finished Non-Emergency Work Orders field.

Total Number of Hours to Complete

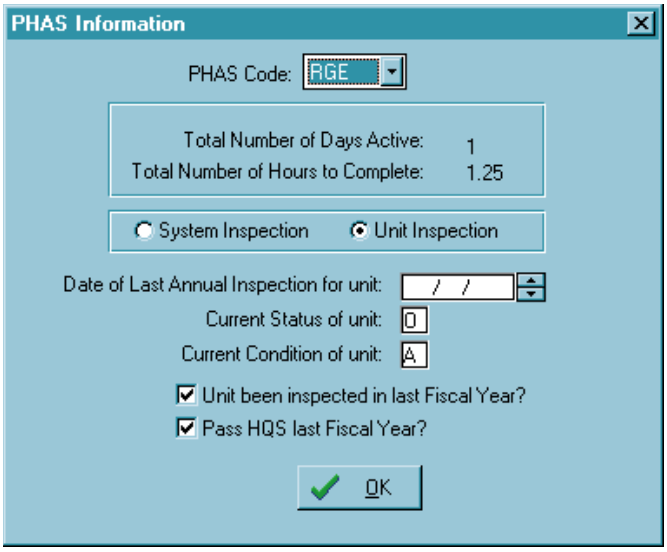
This is the number of hours between the work order's Time Received and Time Completed. It is a measurement, in hours, of the time required to complete this work order.

System Inspection/Unit Inspection

This pair of radio buttons allows you specify whether this work order is related to a system (working on the same thing on multiple units, such as plumbing or water heaters) or a unit (working on everything on one unit). Despite the HUD-standard name, this has nothing to do with inspections.

Date of Last Annual Inspection for Unit

This is the date of the last annual inspection for this unit.


PHAS Information
PHAS Code: RGE
Total Number of Days Active: 1
Total Number of Hours to Complete: 1.25
System Inspection
Unit Inspection
Date of Last Annual Inspection for unit: / /
Current Status of unit: O
Current Condition of unit: A
Unit been inspected in last Fiscal Year?
Pass HQS last Fiscal Year?
OK

Hint: CGW, VFW, DFM

A CGW work order is a Preventive Maintenance-generated work order used for common areas only. All other Preventive Maintenance-generated work orders should have a PHAS code of MGN.

A VFW work order is used to repair a unit during vacancy. The condition of this unit in the Master Unit database must be V(acant). If the unit is not vacant during the time of the work order, VFW will not be an option for you to choose in the PHAS Code drop-down selection box. If the unit is vacant, the date this work order is received cannot be prior to the move-out date of the last resident.

A DFM work order is a work order for repairing a unit under a modernization plan. If the Approved Date for Modernization field is not set for this unit in the Master Unit database, DFM will not be an option for you to choose in the PHAS Code drop-down selection box. If the unit is approved for modernization and is under a modernization plan, the date this work order is received cannot be prior to the Approved Date for Modernization.

Hint: Days Active

Work orders must be tracked for a given assessment year if they:

• were received in a prior assessment year and completed in the current assessment year,

• were received and completed within the current assessment year, and

• were received within, but not completed before the end of, the current assessment year.

Remember, a work order's total days active include the day it was received, the day it was completed, and all intervening days. If a work order starts at 4:58 p.m. on 01/02/2001 and is completed at 8:01 a.m. on 01/03/2001, it is active for 2 days.

Current Status of Unit
This is the unit's current status. The following four one-letter status codes are your options:

V Vacant

O Occupied

E Employee-Occupied

N Non-Dwelling

Current Condition of Unit
This is the condition of the unit at the time the work order was generated. The following seven one-letter condition codes are your options:

A Available to rent or currently occupied

R Vacant, Resident property left in unit and cannot be removed

D Vacant, Deprogramming (Demolition, Disposition)

M Vacant, approved for Modernization plan, CIAP, or Comp Grant

P Vacant due to changing market conditions

E Vacant for legal reasons (federal, state, or local code violations)

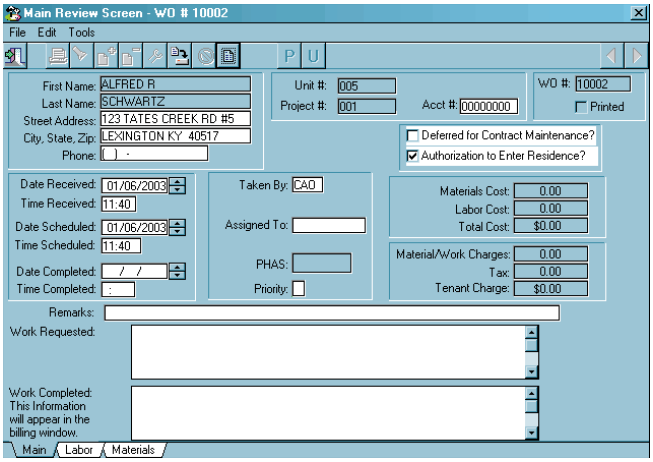
I Vacant for other reasons (natural disaster, casualty damage, litigation, court order)

Unit been inspected in last Fiscal Year?
This box should be checked if the unit has been inspected within the last fiscal year.

Pass HQS last Fiscal Year?
This box should be checked if the unit passed its HQS inspection in the last fiscal year.

NOTE: If you have the WinTen Tenant Accounts Receivable program, the Date of Last Annual Inspection for Unit field and all fields after it will not be editable. The WorkOrder program will set these fields to the values they have in the unit's record within the Tenant Accounts Receivable database.

Main Tab Data Fields



First Name
This is the first name of the tenant associated with this work order. If you are running Tenant Accounts Receivable and you have selected an occupied unit, WorkOrder will fill in this field and you will not be able to edit it.

Last Name
This is the last name of the tenant associated with this work order. If you are running Tenant Accounts Receivable and you have selected an occupied unit, WorkOrder will fill in this field and you will not be able to edit it. If you have selected a vacant unit, WorkOrder will fill in "VACANT" here.

Street Address
This is the street address of the unit associated with this work order. If you are running Tenant Accounts Receivable and you have selected a unit that is in the Master Unit database, WorkOrder will fill in this field.

City, State, Zip
This is the city, state, and zip code of the unit address. If you are running Tenant Accounts Receivable and you have selected a unit that is in the Master Unit database, WorkOrder will fill in this field.

Phone
This is the tenant's phone number, if applicable and available. This may be particularly useful for maintenance personnel who need to contact the tenant to see if he is home before entering the unit to do work.

Unit
This is the number of the unit where the work will be or was performed.

Project
This is the number of the project (development) in which the unit is located, if applicable.

Account
This is the tenant's account number in Tenant Accounts Receivable, if applicable.

WO Number
This is the internal reference number that the program has assigned to this work order. You cannot edit this field.

Printed
This box will be checked if the work order has been printed. You cannot edit this field.

Date Received
This is the date on which the work order was received. When you create a new work order, the program will set this date to the current system date if you have selected Set Date/Time Automatically on the Default Settings tab of the Setup screen. This is required for PHAS reporting and should always be filled in.

Time Received
This is the time at which the work order was received. When you create a new work order, the program will set this time to the current system time if you have selected Set Date/Time Automatically on the Default Settings tab of the Setup screen. This is required for PHAS reporting and should always be filled in.

Date Scheduled
This is the date on which the work order is scheduled to be carried out. When you create a new work order, the program will set this date to the current system date if you have selected Set Date/Time Automatically on the Default Settings tab of the Setup screen. This is required for PHAS reporting and should always be filled in.

Time Scheduled
This is the time at which the work order is scheduled to be carried out. When you create a new work order, the program will set this time to the current system time if you have selected Set Date/Time Automatically on the Default Settings tab of the Setup screen. This is required for PHAS reporting and should always be filled in.

Date Completed
This is the date on which the work order was completed. This is required for PHAS reporting and should always be filled in once the work order is completed.

Time Completed
This is the time at which the work order was completed. This is required for PHAS reporting and should always be filled in once the work order is completed.

Taken By
These are the initials of the user who entered the work order.

Assigned To
Enter the name of the maintenance employee who is assigned to this work order. You can fill this in or the field will automatically be filled in with the first labor record maintenance employee.

PHAS
This is the PHAS code used for tracking and reporting this work order. This field is required. You cannot edit it directly on this screen; you must use the PHAS Information dialog box, accessed through the PHAS toolbar button.

Priority
This is a one-character code for distinguishing between types of work orders. This is optional and your agency can define any desired system of priority codes. We suggest either a one-letter code ("E" for emergencies, "P" for preventive maintenance, "R" for regular jobs) or a one-numeral code (1 being highest priority and 5 being lowest). You can generate reports on work orders with specific priority codes on the Reports screen of the program.

Deferred for Contract Maintenance?
Place a check mark in this box if this work is going to be completed by an outside contractor. Work orders deferred for contract maintenance will not appear on the Outstanding Work Orders report.

Authorization to Enter Residence
Place a check mark in this box if maintenance personnel have permission to enter the residence while the occupant is absent.

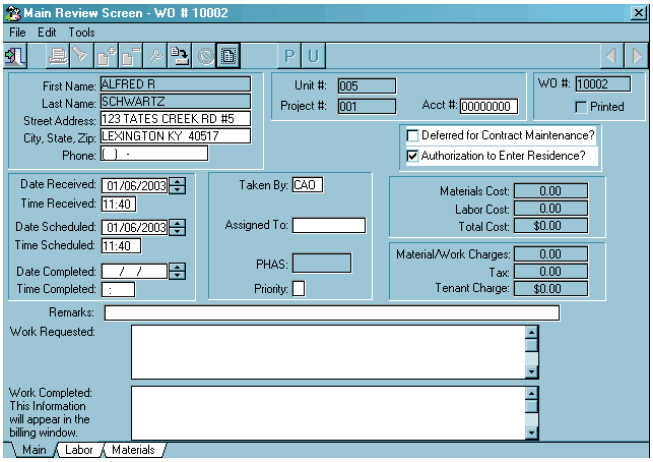
Materials Cost
This is the total material cost that the work order has incurred. The program automatically calculates the value in this field based on the data on the Materials tab. You cannot edit this field.

Labor Cost
This is the total labor cost that the work order has incurred. The program automatically calculates the value in this field based on the data on the Labor tab. You cannot edit this field.

Total Cost
This is the total of the Materials Cost and Labor Cost fields. You cannot edit this field.

Material/Work Charges
This is the subtotal of material and labor charges to the tenant. The program automatically calculates the value in this field based on the data on the Materials tab. You cannot edit this field.

Tax
This is the tax applied to the material/work charges. This is calculated if you have entered a nonzero tax rate on the Setup screen; otherwise, it is set to zero. You cannot edit this field.



Tenant Charge
This is the total of material/work charges and tax. This is the amount that will be charged to the tenant's account in Tenant Account Receivables if you have tied the WorkOrder program to the Tenant Accounts Receivable program. You cannot edit this field.

Remarks
This is a 70-character comment field for informational remarks about the work order. Typically, this is used for information that maintenance personnel will need before beginning work, such as "tenant has dog" or "knock loud, tenant is hard of hearing."

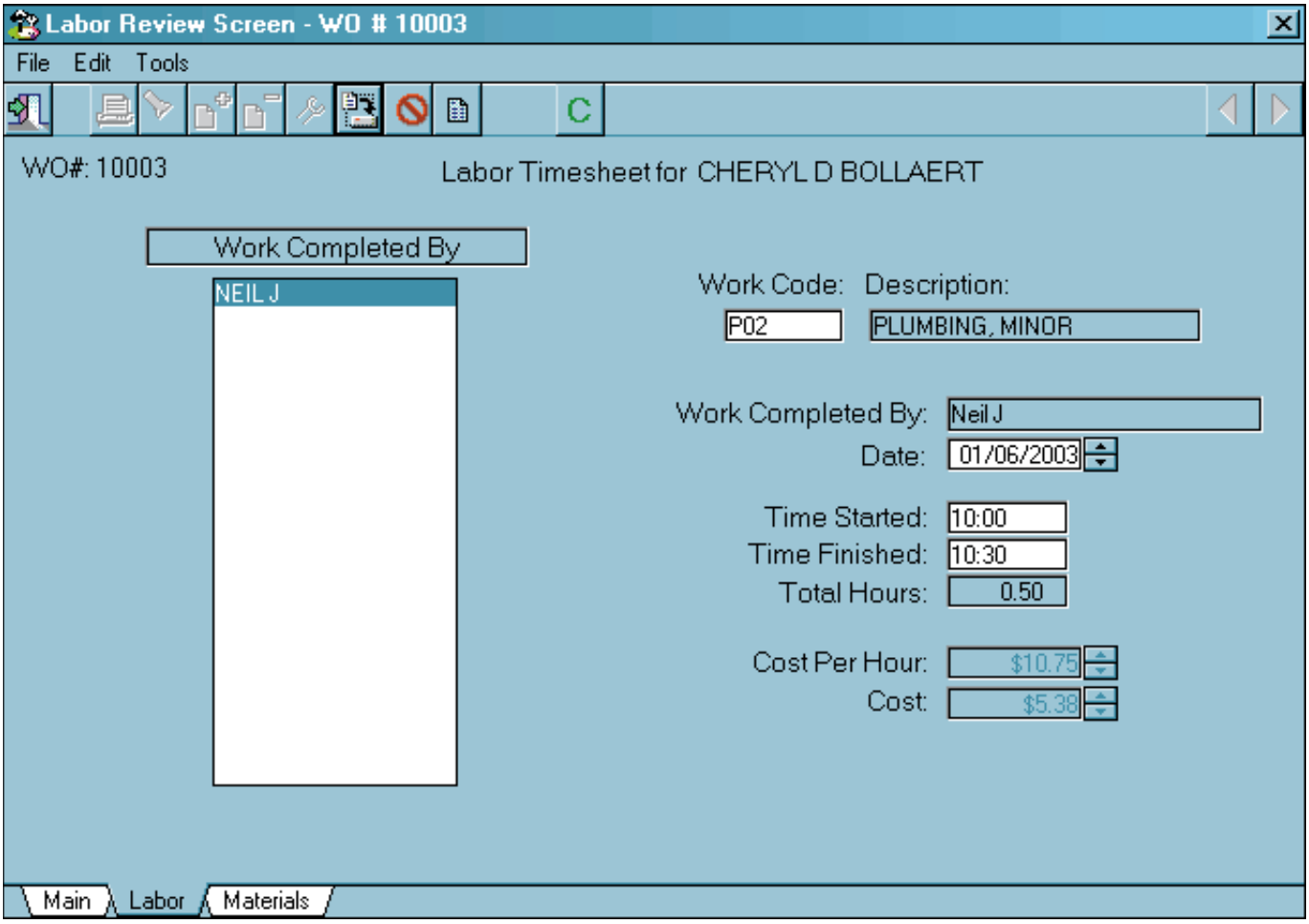
Work Requested
This is a description of the work that has been requested. There is no limit on the amount of text you can enter in this field.

Work Completed
This is a description of the work that has been completed for this work order. There is no limit on the amount of text you can enter in this field.

NOTE: The first four lines in the Work Completed field will appear on the work order bill produced by Tenant Accounts Receivable if the programs are linked. Accordingly, the first four lines of this field should be information that will be meaningful to the tenant, such as a summary of the work that was done.

Labor Tab

The Labor tab allows you to track labor hours that this work order has incurred. Each employee who works on a specific work order will have one labor record for each separate time he worked on the work order. You can also apply a labor charge to each labor record.

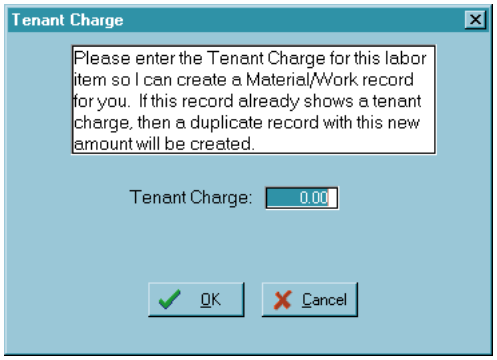


Labor Tab Controls

Tenant Charge

The Tenant Charge button opens the Tenant Charge dialog box.

Tenant Charge Dialog Box


Tenant Charge
Please enter the Tenant Charge for this labor item so I can create a Material/Work record for you. If this record already shows a tenant charge, then a duplicate record with this new amount will be created.
Tenant Charge: 0.00
OK
Cancel

The Tenant Charge dialog box allows you to enter a tenant charge for the currently selected labor record. This charge will be posted to the tenant's account in Tenant Accounts Receivable, and an entry will be added to the Materials tab showing the labor charge and the employee..

Labor Tab Data Fields

Work Code
This is the work code to use for this labor record.

Description
This is the description associated with the selected work code. The program automatically fills in this field when you enter a work code. You cannot edit this field.

Work Completed By
This drop-down selection box contains the names of every employee who is listed on the Maintenance Employees tab of the Setup screen. Select the employee for whom you are creating a labor record.

Date
This is the date on which the labor being recorded was performed.

Time Started
This is the time at which the labor being recorded was begun. Enter this in 24-hour format (e.g. 4:00 pm is 16:00).

Time Finished
This is the time at which the labor being recorded was completed.

Total Hours
This is the total number of hours that the labor being recorded took. The program calculates this automatically based on the Time Started and Time Finished fields. You cannot edit this field.

Cost Per Hour
This is the cost per hour of the selected employee's labor, as defined on the Maintenance Employees tab of the Setup screen. You cannot edit this field.

Cost
This is the total cost for this labor record. The program calculates this based on the Cost Per Hour and the Total Hours fields. You cannot edit this field.

Hint: Work Code

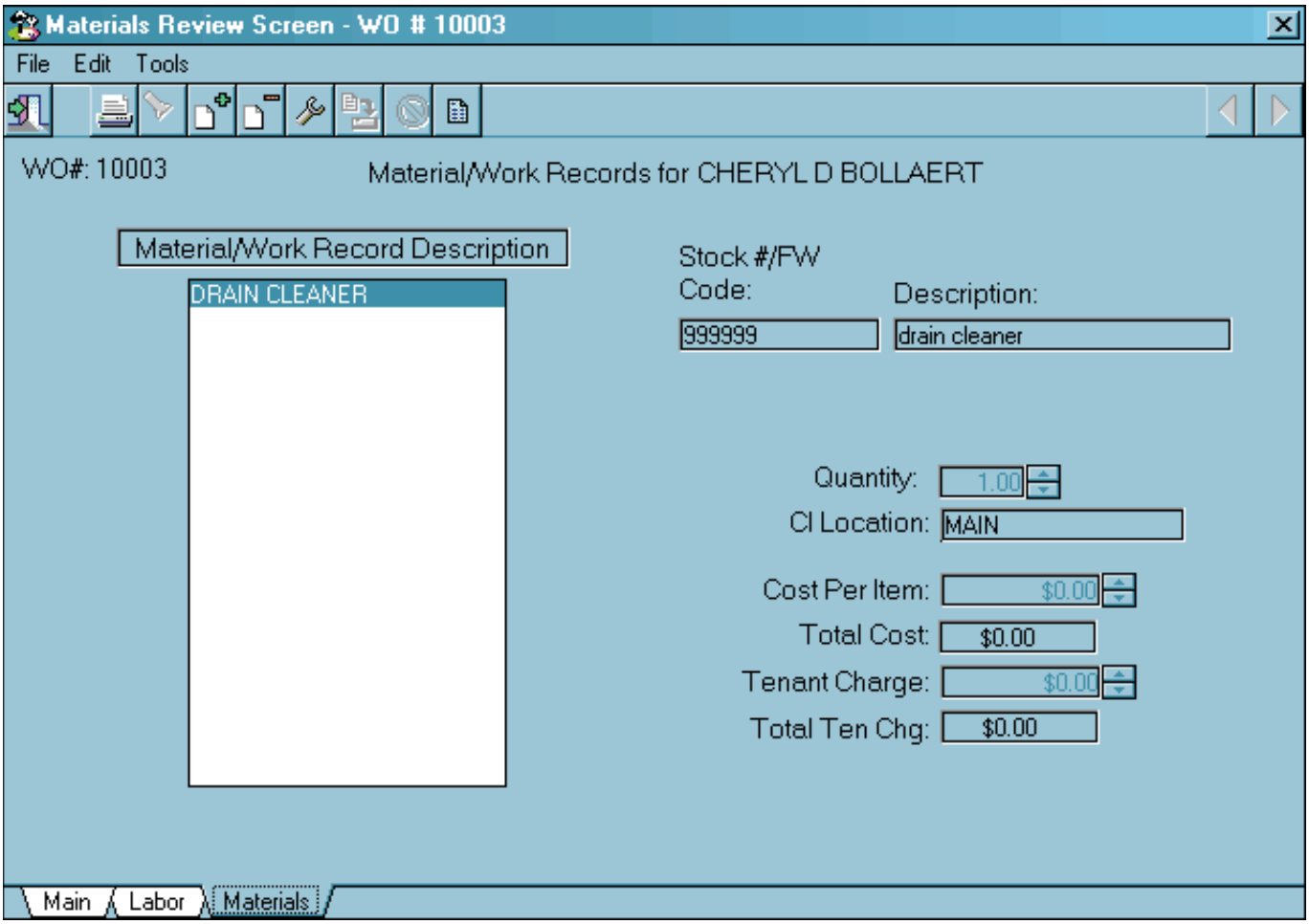
If you do not have your agency's list of work codes committed to memory, enter anything in the Work Code field and press <Tab>. The Work Code and Description fields change to a drop-down selection box which contains all of the possible work codes and their descriptions. Use this drop-down box to select the correct work code for this labor record.

Hint: Work Completed By

Remember, if you use separate entries for regular and overtime labor rates for your maintenance employees, they will both be listed in the selection box. Be certain to choose the correct one. If an employee has put in both regular time and overtime work on this work order, remember to record these separately.

Materials Tab

The Materials tab allows you to record all consumable inventory item usage and fixed work codes associated with this work order. If WorkOrder is tied to the Consumable Inventory program, entering a consumable item on this tab will result in that item being removed from inventory in Consumable Inventory.



Materials Tab Data Fields

Stock #/FW Code
This is the stock number or fixed work code for the item or standardized task.

Description
This is the item description or fixed work code task description. The program automatically fills in this field if you have entered a stock number or fixed work code. If you choose to enter a custom item, you can modify the description.

Quantity
This is the quantity of the item used. If the program is connected to the Consumable Inventory program, this is the quantity of the item that will be removed from inventory.

CI Location
This is the inventory location from which the item(s) will be removed. The drop-down selection box allows you to pick from any location (A through T) that is set up in the Consumable Inventory program. You can also leave the selection box set to the blank option to remove the item(s) used from the main inventory location. Please refer to your Tenmast Consumable Inventory manual for further details on inventory locations.

Cost Per Item
This is the per unit cost of the item/task. If WorkOrder is connected to Consumable Inventory, the program will automatically fill in this field and you will be unable to edit it.

Total Cost
This is the amount entered in the Cost Per Item field multiplied by the number entered in the Quantity field. You cannot edit this field.

Tenant Charge
This is the charge to the tenant for the item/task. If you are adding a fixed work code and a charge is defined in that fixed work code's setup, the program will automatically fill in this field.

Total Ten Chg
This is the amount entered in the Tenant Charge field multiplied by the number entered in the Quantity field. You cannot edit this field.

Hint

When adding work orders, you have several options for adding material items:

1. *Type a valid consumable inventory item by entering the stock number that the Consumable Inventory program uses for it.*
2. *Add a Fixed Price Code by entering "FW" in the Stock # field.*
3. *If you need an item that is not kept in the Consumable Inventory program but was used on this work order, type an abbreviated description for the stock number. The program will display a message that the stock number was not in Consumables - should it be used anyway? Answer "yes" to this to keep the custom stock number. You can then edit the description and cost of the item.*
4. *You can also add a general labor charge by adding a new item and typing "labor" in the Stock # field. Answer "yes" when the program asks you if you want to use this stick number, then enter a description and tenant charge.*

Hint

If you do not have your agency's list of consumable items committed to memory, enter anything in the Stock #/FW Code field and press <Tab>. The Stock #/FW Code and Description fields change to a drop-down selection box which contains every item in the Consumable Inventory database. Use this drop-down box to select the correct item for this material record.

If you want to enter a fixed work code, enter "FW" in the Stock #/FW Code field and press <Tab>. The Stock #/FW Code and Description fields change to a drop-down selection box which contains every fixed work code in WorkOrder's database.

Review/Edit Existing Work Orders

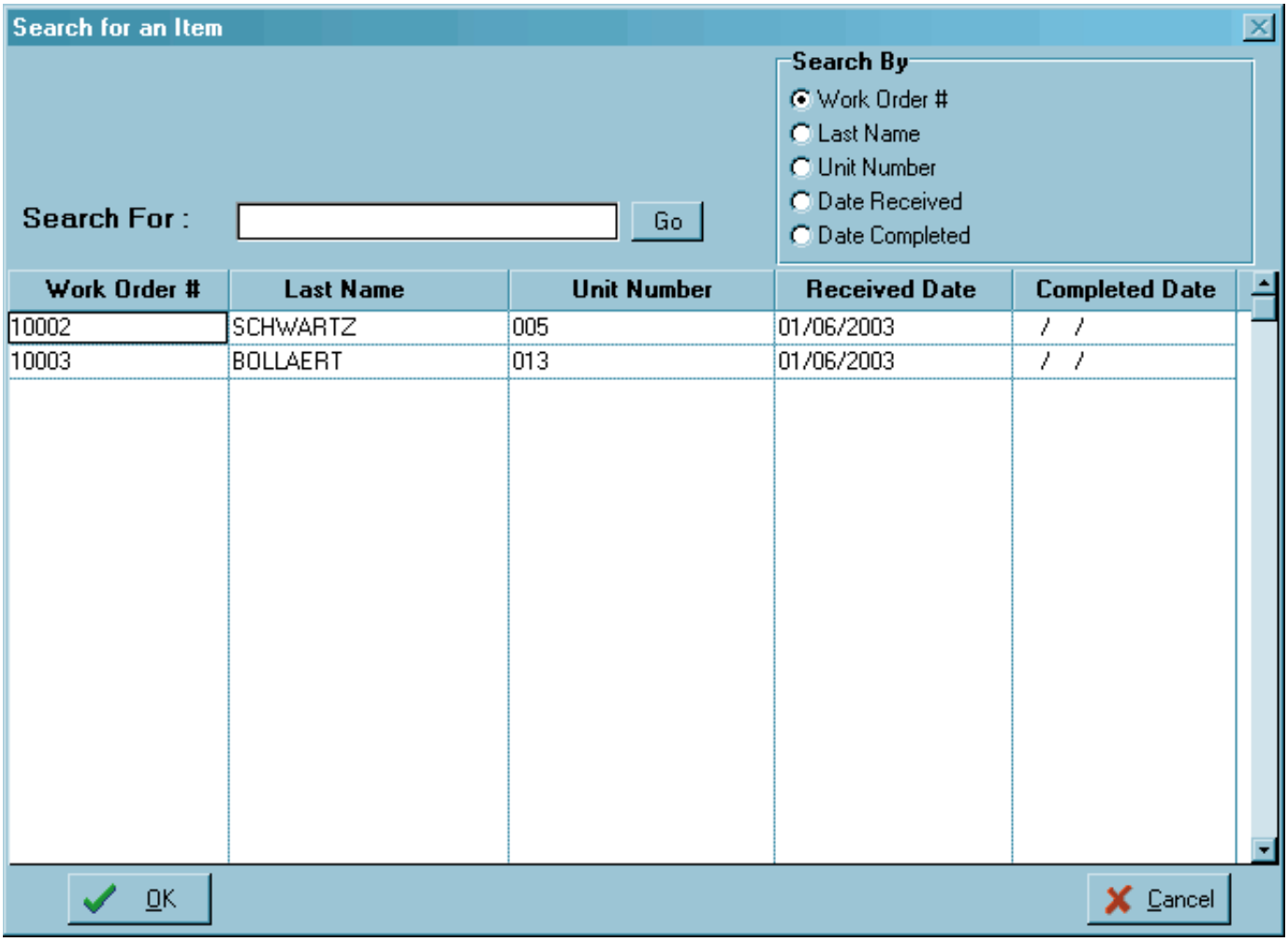
Very few work orders will be complete once you add them to the system. In almost every case, you will need to return to a work order's record one or more times to add additional data to it. To do this, click the Edit button or press <E> at the Main Menu.

Search for an Item Screen

The first screen that appears when you enter the Review/Edit Work Orders area is the Search for an Item screen. This screen contains a table of all of the work orders in WorkOrder's database. This screen enables you to search for a work order to review and edit.

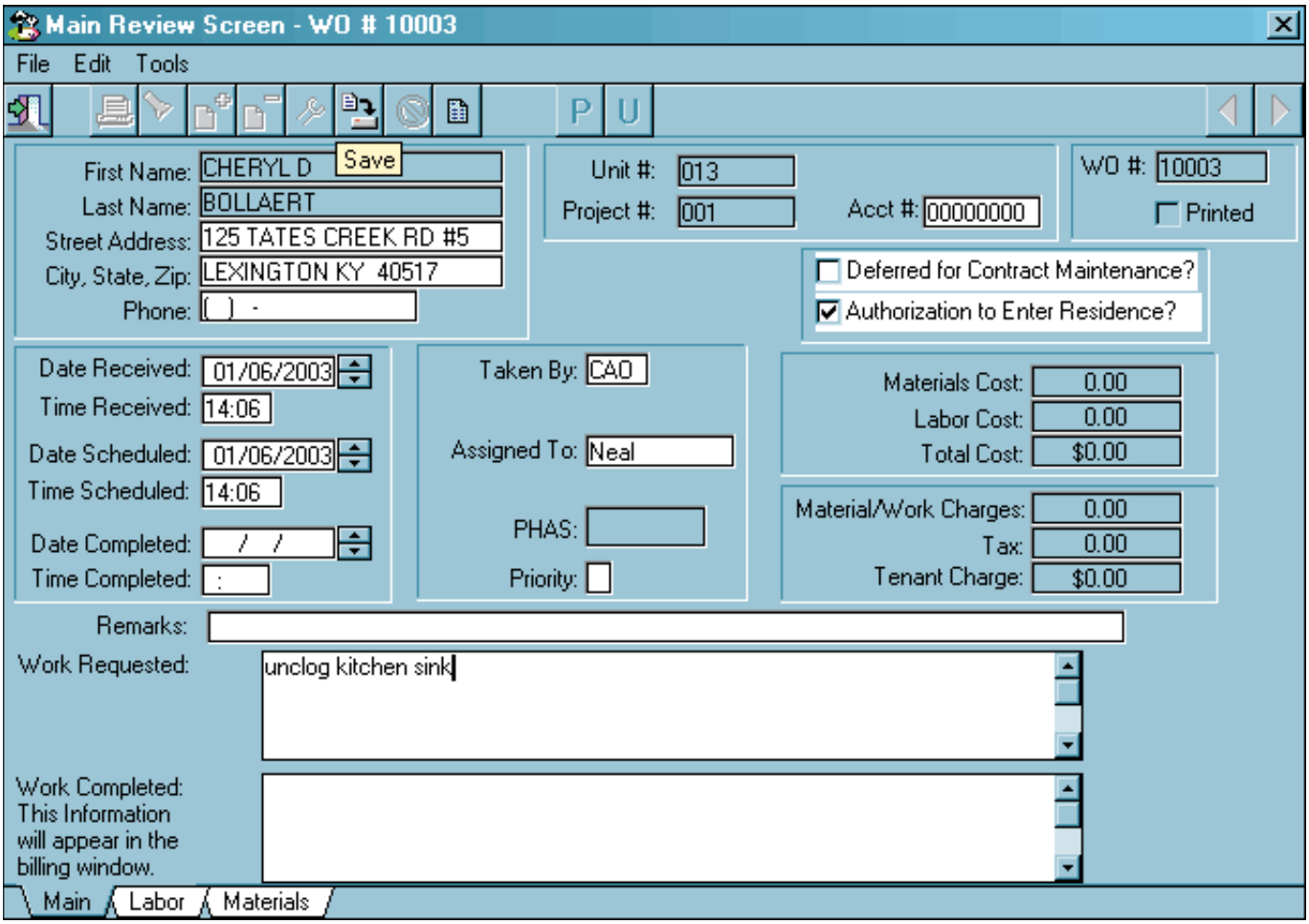
Use the Search By radio buttons to select the order in which the work order records are displayed in the table. Enter the target of your search in this Search For data field and click the Go button. The program searches whichever set of fields you have selected with the Search By radio buttons and highlights the first record in the table that matches your search target.

To edit the currently selected work order, click the OK button.



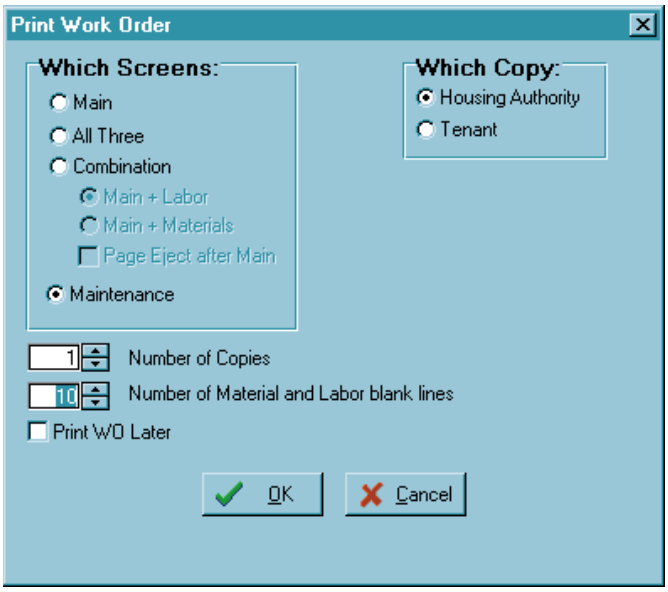
Review Screen

The Review Screen contains all of the data for one work order. This screen has three tabs: Main, Labor, and Materials. It always opens on the Main tab.



Printing in the Review Screen

The Print toolbar button, shown to the right, operates in a slightly different fashion on the Review screen of WorkOrder than it does in most WinTen programs. On all three tabs of this screen, the Print button opens the Print Work Order dialog box.



Print Work Order Dialog Box

The Print Work Order dialog box allows you to print the currently selected work order while you are in the process of editing or reviewing it. You can use this function at any point during the work order's life cycle, whether you are initially adding it, revising it, or recording the work's completion. This dialog box provides you with a variety of printing options.

Which Screens

This set of radio buttons allows you to select what data from the work order will be printed. You can select the data from the main tab, from all three tabs, from the main and labor tabs, from the main and materials tabs, or a maintenance printout. The maintenance printout contains data from all three tabs, along with blank lines for maintenance personnel in the field to record labor and materials information.

Which Copy

This pair of radio buttons allows you to specify whether the printed work order is intended for internal or tenant use. A housing authority copy contains information on both costs and charges. A tenant copy only contains information on charges to the tenant.

Number of Copies

This data field allows you to select how many copies of the work order will be printed.

Number of Material and Labor Blank Lines

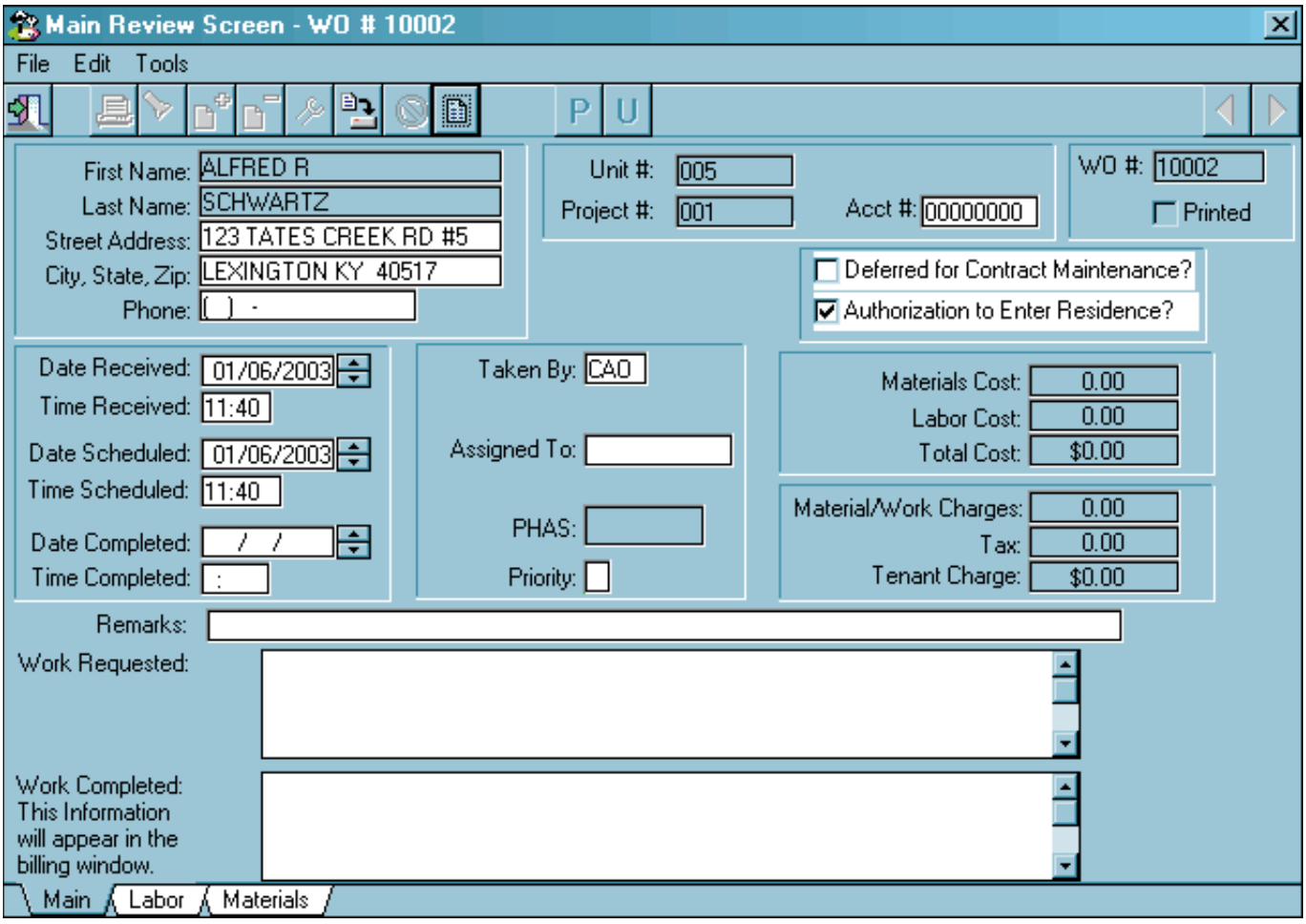
This data field allows you to select how many blank lines will be printed on the maintenance copy of the work order for recording labor and materials information. It is only visible if you have selected the maintenance copy in the Which Screens set of radio buttons.

Print WO Later

Normally, the work order will be printed as soon as you click the OK button. If you check this box, the work order will not be printed but will be saved in a database. If you choose to do this, you will need an additional program which will print the work orders from the databases - WorkOrder will not print these. This option is usually used only for remote sites that do not have printing capability.

Main Tab

The Main tab contains the general scheduling and cost/charge data for the work order.



Main Tab Controls

Change Unit Number Button

The Change Unit Number button opens the Input a New Work Order dialog box again. This allows you to change the unit number to which the work order is linked.

PHAS Button

The PHAS button opens the PHAS Information dialog box. This dialog box contains the PHAS reporting information for the work order. If the unit to which the work order is linked is in the Master Unit database, the program will fill in most of these data fields automatically and you will be unable to edit them.

PHAS Information Dialog Box

The PHAS Information Dialog Box contains all PHAS reporting information for this work order.

PHAS Information Dialog Box Data Fields

PHAS Code
This drop-down selection box allows you to set the PHAS code for tracking this work order. This field is required. The following are your options:

RGN Resident-Generated Non-Emergency

RGE Resident-Generated Emergency

MGN Management-Generated Non-Emergency

MGE Management-Generated Emergency

AIN Annual Inspection Non-Emergency

AIE Annual Inspection Emergency

SID System Inspection Deficiency

CGWCyclical Generated Work Order

VFW Vacancy Fix-Up Work Order

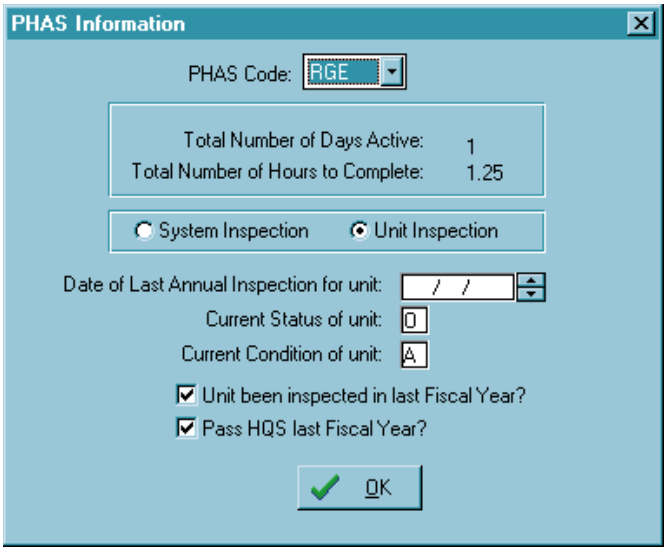
DFM Deferred For Modernization

Total Number of Days Active
This is the number of days the work order is active, determined by the work order's Date Received and Date Completed. It is a measurement, in days, of the time required to complete this work order. This number is used on the PHAS report to calculate the Total Days to Complete Finished Non-Emergency Work Orders field.

Total Number of Hours to Complete
This is the number of hours between the work order's Time Received and Time Completed. It is a measurement, in hours, of the time required to complete this work order.

System Inspection/Unit Inspection
This pair of radio buttons allows you specify whether this work order is related to a system (working on the same thing on multiple units, such as plumbing or water heaters) or a unit (working on everything on one unit). Despite the HUD-standard name, this has nothing to do with inspections.

Date of Last Annual Inspection for Unit
This is the date of the last annual inspection for this unit.



Hint: CGW, VFW, DFM

A CGW work order is a Preventive Maintenance-generated work order used for common areas only. All other Preventive Maintenance-generated work orders should have a PHAS code of MGN.

A VFW work order is used to repair a unit during vacancy. The condition of this unit in the Master Unit database must be V(acant). If the unit is not vacant during the time of the work order, VFW will not be an option for you to choose in the PHAS Code drop-down selection box. If the unit is vacant, the date this work order is received cannot be prior to the move-out date of the last resident.

A DFM work order is a work order for repairing a unit under a modernization plan. If the Approved Date for Modernization field is not set for this unit in the Master Unit database, DFM will not be an option for you to choose in the PHAS Code drop-down selection box. If the unit is approved for modernization and is under a modernization plan, the date this work order is received cannot be prior to the Approved Date for Modernization.

Hint: Days Active

Work orders must be tracked for a given assessment year if they:

• were received in a prior assessment year and completed in the current assessment year,

• were received and completed within the current assessment year, and

• were received within, but not completed before the end of, the current assessment year.

Remember, a work order's total days active include the day it was received, the day it was completed, and all intervening days. If a work order starts at 4:58 p.m. on 01/02/2001 and is completed at 8:01 a.m. on 01/03/2001, it is active for 2 days.

Current Status of Unit
This is the unit's current status. The following four one-letter status codes are your options:

V Vacant

O Occupied

E Employee-Occupied

N Non-Dwelling

Current Condition of Unit
This is the condition of the unit at the time the work order was generated. The following seven one-letter condition codes are your options:

A Available to rent or currently occupied

R Vacant, Resident property left in unit and cannot be removed

D Vacant, Deprogramming (Demolition, Disposition)

M Vacant, approved for Modernization plan, CIAP, or Comp Grant

P Vacant due to changing market conditions

E Vacant for legal reasons (federal, state, or local code violations)

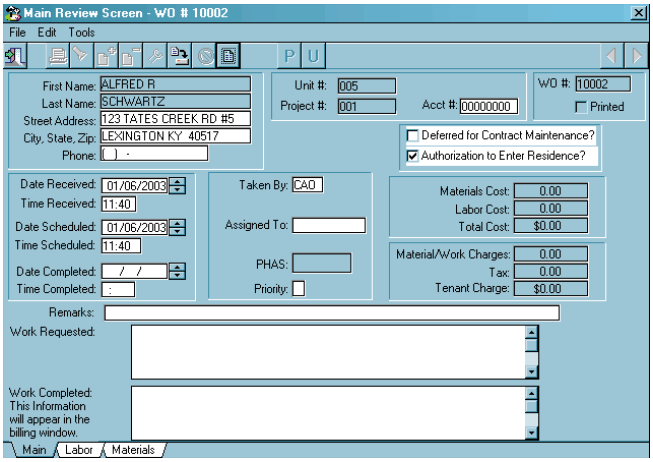
I Vacant for other reasons (natural disaster, casualty damage, litigation, court order)

Unit been inspected in last Fiscal Year?
This box should be checked if the unit has been inspected within the last fiscal year.

Pass HQS last Fiscal Year?
This box should be checked if the unit passed its HQS inspection in the last fiscal year.

NOTE: If you have the WinTen Tenant Accounts Receivable program, the Date of Last Annual Inspection for Unit field and all fields after it will not be editable. The WorkOrder program will set these fields to the values they have in the unit's record within the Tenant Accounts Receivable database.

Main Tab Data Fields



First Name
This is the first name of the tenant associated with this work order. If you are running Tenant Accounts Receivable and you have selected an occupied unit, WorkOrder will fill in this field and you will not be able to edit it.

Last Name
This is the last name of the tenant associated with this work order. If you are running Tenant Accounts Receivable and you have selected an occupied unit, WorkOrder will fill in this field and you will not be able to edit it. If you have selected a vacant unit, WorkOrder will fill in "VACANT" here.

Street Address
This is the street address of the unit associated with this work order. If you are running Tenant Accounts Receivable and you have selected a unit that is in the Master Unit database, WorkOrder will fill in this field.

City, State, Zip
This is the city, state, and zip code of the unit address. If you are running Tenant Accounts Receivable and you have selected a unit that is in the Master Unit database, WorkOrder will fill in this field.

Phone
This is the tenant's phone number, if applicable and available. This may be particularly useful for maintenance personnel who need to contact the tenant to see if he is home before entering the unit to do work.

Unit
This is the number of the unit where the work will be or was performed.

Project
This is the number of the project (development) in which the unit is located, if applicable.

Account
This is the tenant's account number in Tenant Accounts Receivable, if applicable.

WO Number
This is the internal reference number that the program has assigned to this work order. You cannot edit this field.

Printed
This box will be checked if the work order has been printed. You cannot edit this field.

Date Received
This is the date on which the work order was received. When you create a new work order, the program will set this date to the current system date if you have selected Set Date/Time Automatically on the Default Settings tab of the Setup screen. This is required for PHAS reporting and should always be filled in.

Time Received
This is the time at which the work order was received. When you create a new work order, the program will set this time to the current system time if you have selected Set Date/Time Automatically on the Default Settings tab of the Setup screen. This is required for PHAS reporting and should always be filled in.

Date Scheduled
This is the date on which the work order is scheduled to be carried out. When you create a new work order, the program will set this date to the current system date if you have selected Set Date/Time Automatically on the Default Settings tab of the Setup screen. This is required for PHAS reporting and should always be filled in.

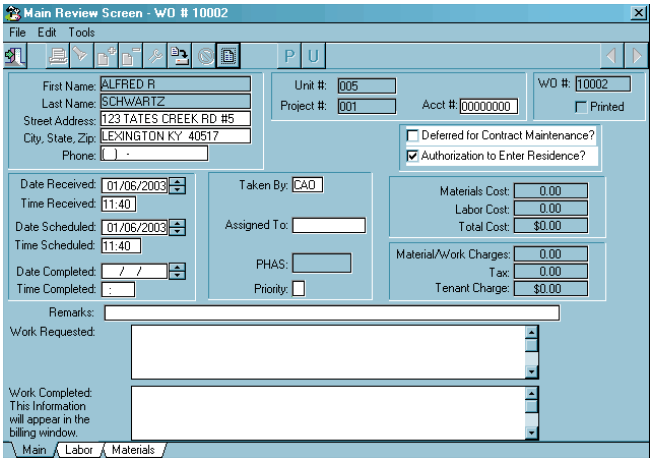
Time Scheduled
This is the time at which the work order is scheduled to be carried out. When you create a new work order, the program will set this time to the current system time if you have selected Set Date/Time Automatically on the Default Settings tab of the Setup screen. This is required for PHAS reporting and should always be filled in.

Date Completed
This is the date on which the work order was completed. This is required for PHAS reporting and should always be filled in once the work order is completed.

Time Completed
This is the time at which the work order was completed. This is required for PHAS reporting and should always be filled in once the work order is completed.

Taken By
These are the initials of the user who entered the work order.

Assigned To
Enter the name of the maintenance employee who is assigned to this work order. You can fill this in or the field will automatically be filled in with the first labor record maintenance employee.



PHAS
This is the PHAS code used for tracking and reporting this work order. This field is required. You cannot edit it directly on this screen; you must use the PHAS Information dialog box, accessed through the PHAS toolbar button.

Priority
This is a one-character code for distinguishing between types of work orders. This is optional and your agency can define any desired system of priority codes. We suggest either a one-letter code ("E" for emergencies, "P" for preventive maintenance, "R" for regular jobs) or a one-numeral code (1 being highest priority and 5 being lowest). You can generate reports on work orders with specific priority codes on the Reports screen of the program.

Deferred for Contract Maintenance?
Place a check mark in this box if this work is going to be completed by an outside contractor. Work orders deferred for contract maintenance will not appear on the Outstanding Work Orders report.

Authorization to Enter Residence
Place a check mark in this box if maintenance personnel have permission to enter the residence while the occupant is absent.

Materials Cost
This is the total material cost that the work order has incurred. The program automatically calculates the value in this field based on the data on the Materials tab. You cannot edit this field.

Labor Cost
This is the total labor cost that the work order has incurred. The program automatically calculates the value in this field based on the data on the Labor tab. You cannot edit this field.

Total Cost
This is the total of the Materials Cost and Labor Cost fields. You cannot edit this field.

Material/Work Charges
This is the subtotal of material and labor charges to the tenant. The program automatically calculates the value in this field based on the data on the Materials and Labor tabs. You cannot edit this field.

Tax
This is the tax applied to the material/work charges. This is calculated if you have entered a nonzero tax rate on the Setup screen; otherwise, it is set to zero. You cannot edit this field.

Tenant Charge
This is the total of material/work charges and tax. This is the amount that will be charged to the tenant's account in Tenant Account Receivables if you have tied the WorkOrder program to Receivables. You cannot edit this field.

Remarks
This is a 70-character comment field for informational remarks about the work order. Typically, this is used for information that maintenance personnel will need before beginning work, such as "tenant has dog" or "knock loud, tenant is hard of hearing."

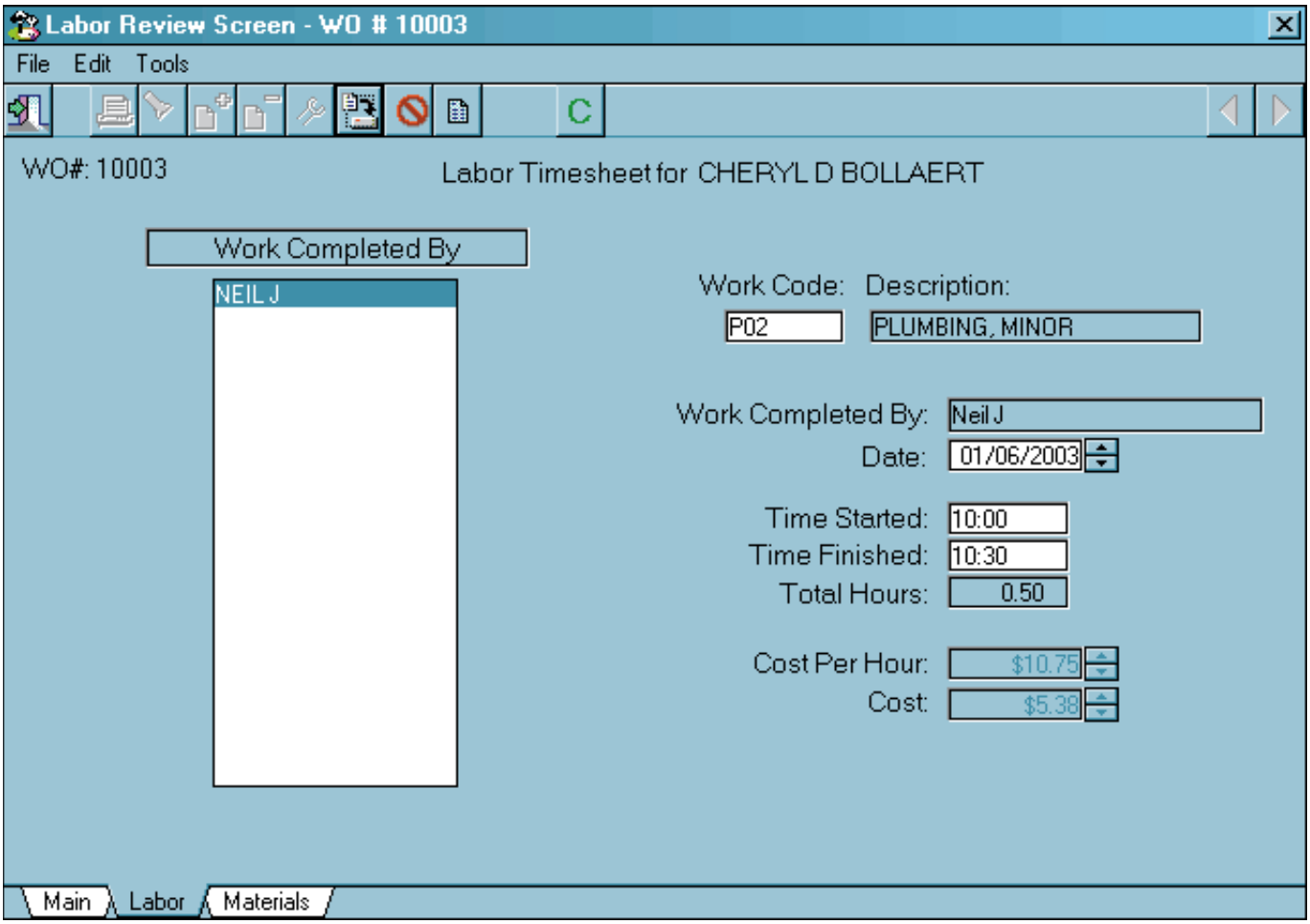
Work Requested
This is a description of the work that has been requested. There is no limit on the amount of text you can enter in this field.

Work Completed
This is a description of the work that has been completed for this work order. There is no limit on the amount of text you can enter in this field.

NOTE: The first four lines in the Work Completed field will appear on the work order bill produced by Tenant Accounts Receivable if the programs are linked. Accordingly, the first four lines of this field should be information that will be meaningful to the tenant, such as a summary of the work that was done.

Labor Tab

The Labor tab allows you to track labor hours that this work order has incurred. Each employee who works on a specific work order will have one labor record for each separate time he worked on the work order. You can also apply a labor charge to each labor record.

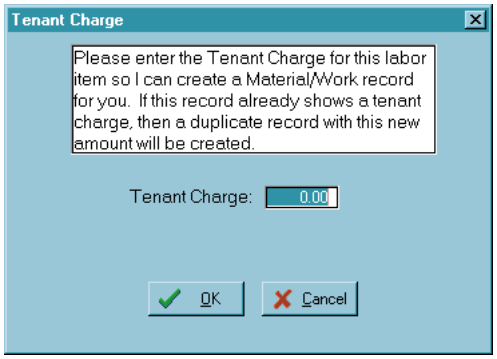


Labor Tab Toolbar Buttons

Tenant Charge Button

The Tenant Charge button opens the Tenant Charge dialog box.

Tenant Charge Dialog Box


Tenant Charge
Please enter the Tenant Charge for this labor item so I can create a Material/Work record for you. If this record already shows a tenant charge, then a duplicate record with this new amount will be created.
Tenant Charge: 0.00
OK
Cancel

The Tenant Charge dialog box allows you to enter a tenant charge for the currently selected labor record. This charge will be posted to the tenant's account in Tenant Accounts Receivable, and an entry will be added to the Materials tab showing the labor charge and the employee..

Labor Tab Data Fields

Work Code
This is the work code to use for this labor record.

Description
This is the description associated with the selected work code. The program automatically fills in this field when you enter a work code. You cannot edit this field.

Work Completed By
This drop-down selection box contains the names of every employee who is listed on the Maintenance Employees tab of the Setup screen. Select the employee for whom you are creating a labor record.

Date
This is the date on which the labor being recorded was performed.

Time Started
This is the time at which the labor being recorded was begun. Enter this in 24-hour format (e.g. 4:00 pm is 16:00).

Time Finished
This is the time at which the labor being recorded was completed.

Total Hours
This is the total number of hours that the labor being recorded took. The program calculates this automatically based on the Time Started and Time Finished fields. You cannot edit this field.

Cost Per Hour
This is the cost per hour of the selected employee's labor, as defined on the Maintenance Employees tab of the Setup screen. You cannot edit this field.

Cost
This is the total cost for this labor record. The program calculates this based on the Cost Per Hour and the Total Hours fields. You cannot edit this field.

Hint: Work Code

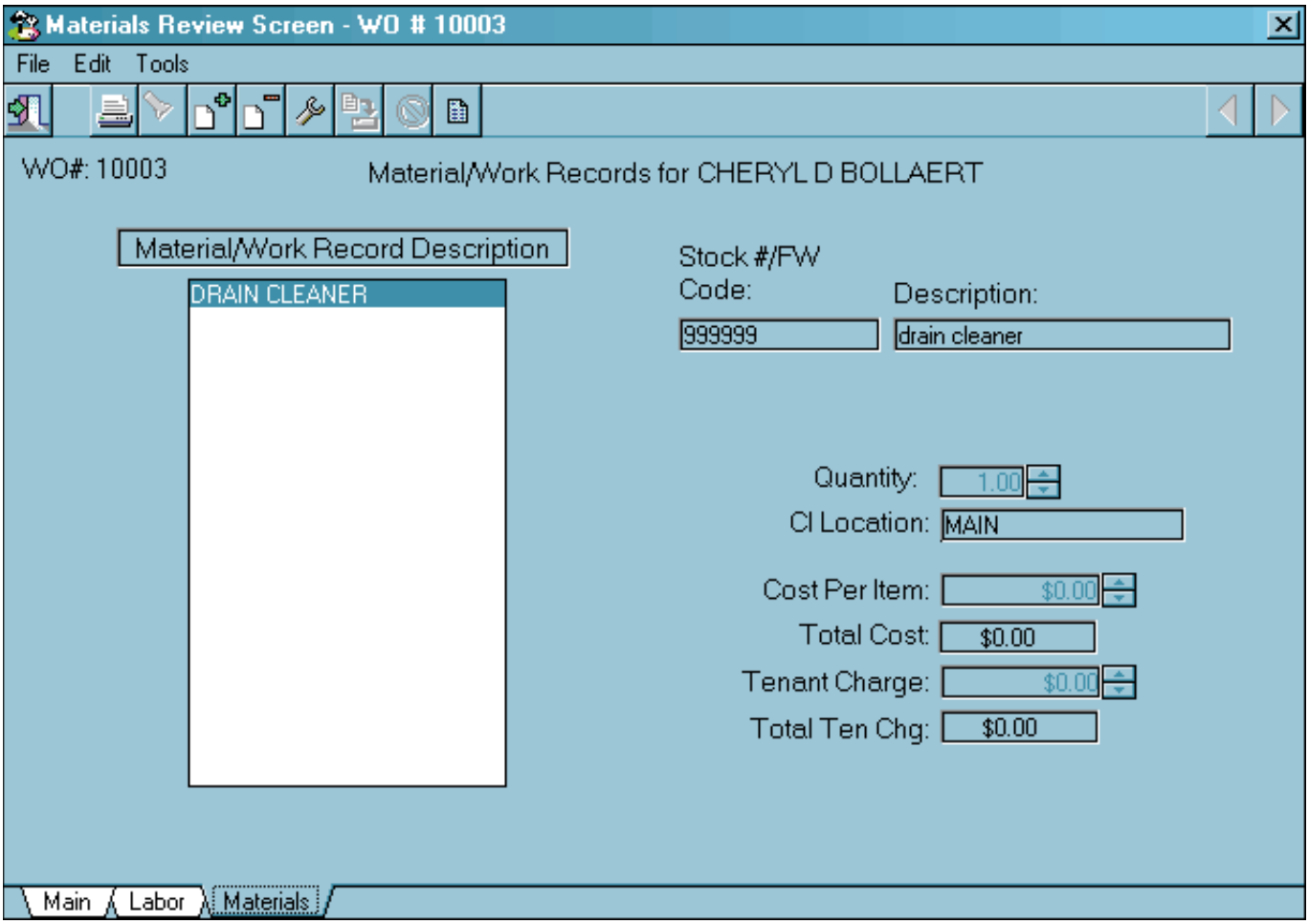
If you do not have your agency's list of work codes committed to memory, enter anything in the Work Code field and press <Tab>. The Work Code and Description fields change to a drop-down selection box which contains all of the possible work codes and their descriptions. Use this drop-down box to select the correct work code for this labor record.

Hint: Work Completed By

Remember, if you use separate entries for regular and overtime labor rates for your maintenance employees, they will both be listed in the selection box. Be certain to choose the correct one. If an employee has put in both regular time and overtime work on this work order, remember to record these separately.

Materials Tab

The Materials tab allows you to record all consumable inventory item usage and fixed work codes associated with this work order. If WorkOrder is tied to the Consumable Inventory program, entering a consumable item on this tab will result in that item being removed from inventory in Consumable Inventory.



Materials Tab Data Fields

Stock #/FW Code
This is the stock number or fixed work code for the item or standardized task.

Description
This is the item description or fixed work code task description. The program automatically fills in this field once you have entered a stock number or fixed work code. You cannot edit this field.

Quantity
This is the quantity of the item used. If the program is connected to the Consumable Inventory program, this is the quantity of the item that will be removed from inventory.

CI Location
This is the inventory location from which the item(s) will be removed. The drop-down selection box allows you to pick from any location (A through T) that is set up in the Consumable Inventory program. You can also leave the selection box set to the blank option to remove the item(s) used from the main inventory location. Please refer to your Tenmast Consumable Inventory manual for further details on inventory locations.

Cost Per Item
This is the per unit cost of the item/task. If WorkOrder is connected to Consumable Inventory, the program will automatically fill in this field and you will be unable to edit it.

Total Cost
This is the amount entered in the Cost Per Item field multiplied by the number entered in the Quantity field. You cannot edit this field.

Tenant Charge
This is the charge to the tenant for the item/task. If you are adding a fixed work code and a charge is defined in that fixed work code's setup, the program will automatically fill in this field.

Total Ten Chg
This is the amount entered in the Tenant Charge field multiplied by the number entered in the Quantity field. You cannot edit this field.

Hint

When adding work orders, you have several options for adding material items:

1. *Type a valid consumable inventory item by entering the stock number that the Consumable Inventory program uses for it.*
2. *Add a Fixed Price Code by entering "FW" in the Stock # field.*
3. *If you need an item that is not kept in the Consumable Inventory program but was used on this work order, type an abbreviated description for the stock number. The program will display a message that the stock number was not in Consumables - should it be used anyway? Answer "yes" to this to keep the custom stock number. You can then edit the description and cost of the item.*
4. *You can also add a general labor charge by adding a new item and typing "labor" in the Stock # field. Answer "yes" when the program asks you if you want to use this stick number, then enter a description and tenant charge.*

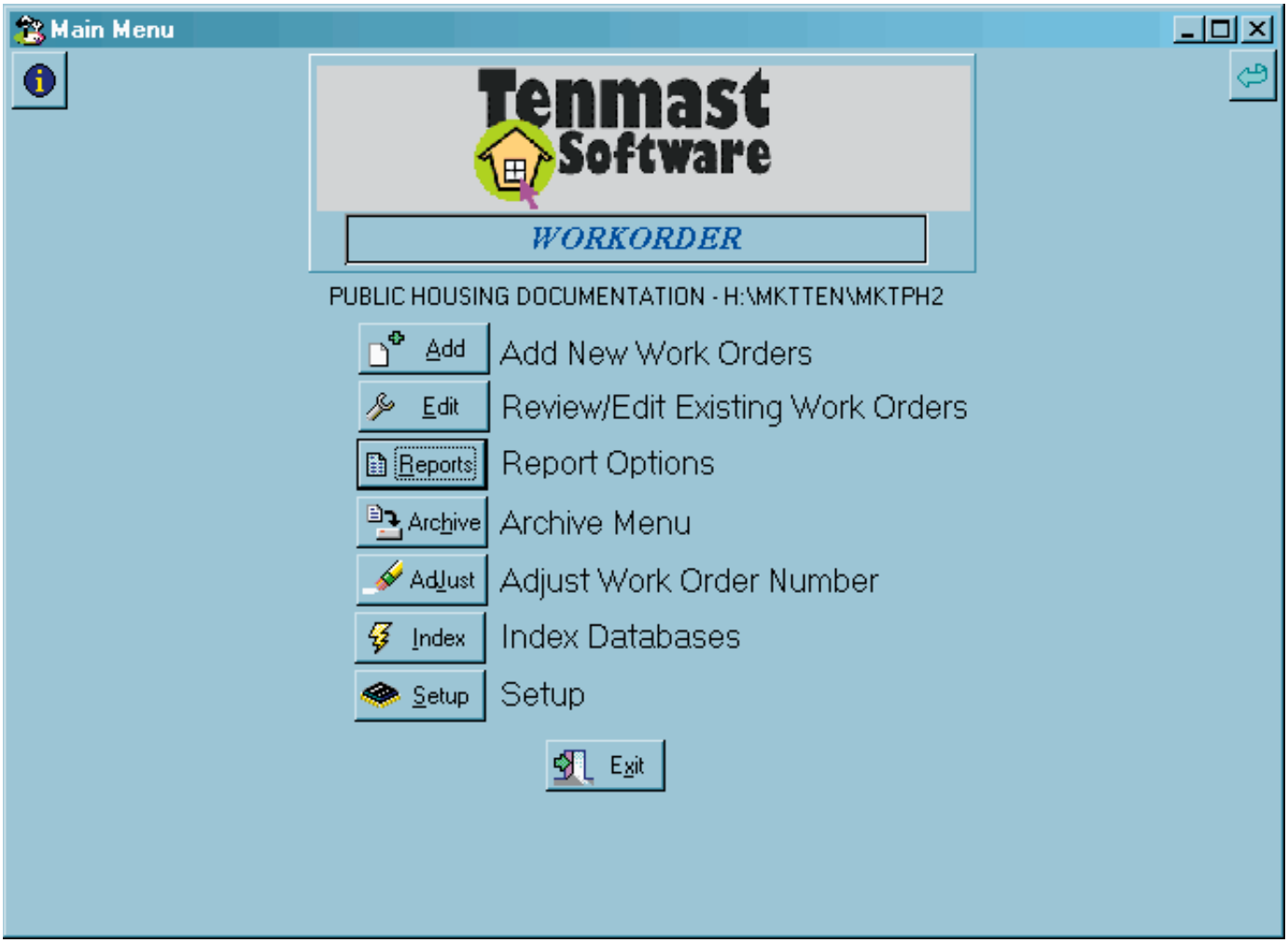
Hint

If you do not have your agency's list of consumable items committed to memory, enter anything in the Stock #/FW Code field and press <Tab>. The Stock #/FW Code and Description fields change to a drop-down selection box which contains every item in the Consumable Inventory database. Use this drop-down box to select the correct item for this material record.

If you want to enter a fixed work code, enter "FW" in the Stock #/FW Code field and press <Tab>. The Stock #/FW Code and Description fields change to a drop-down selection box which contains every fixed work code in WorkOrder's database.

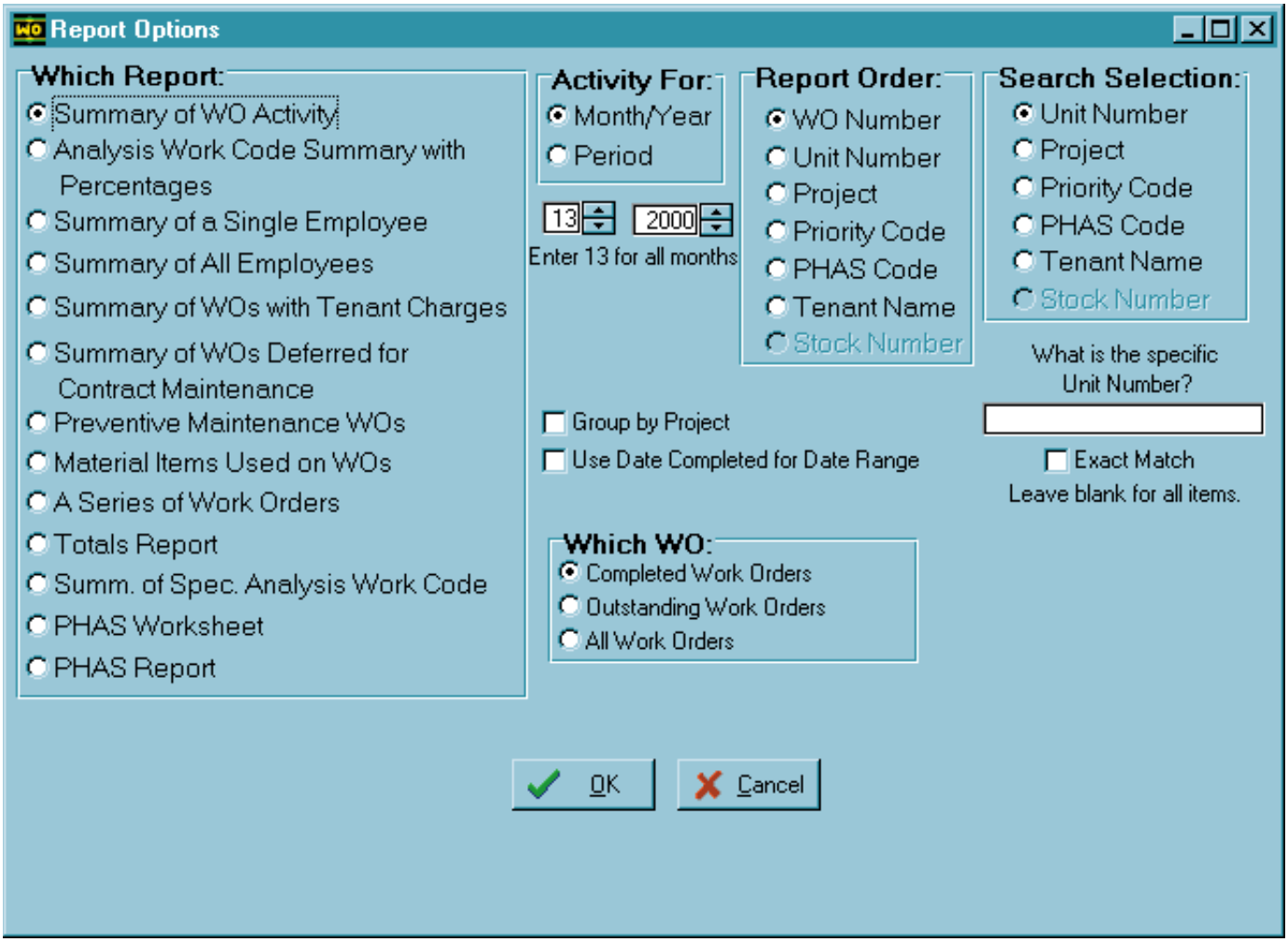
Reports

Information needs to be summarized and presented in an easy-to-understand form so the reader can make informed decisions. The Report Options screen is where WorkOrder turns all of its data into meaningful reports. You enter this screen by clicking the Reports button or by pressing <R> at the Main Menu.



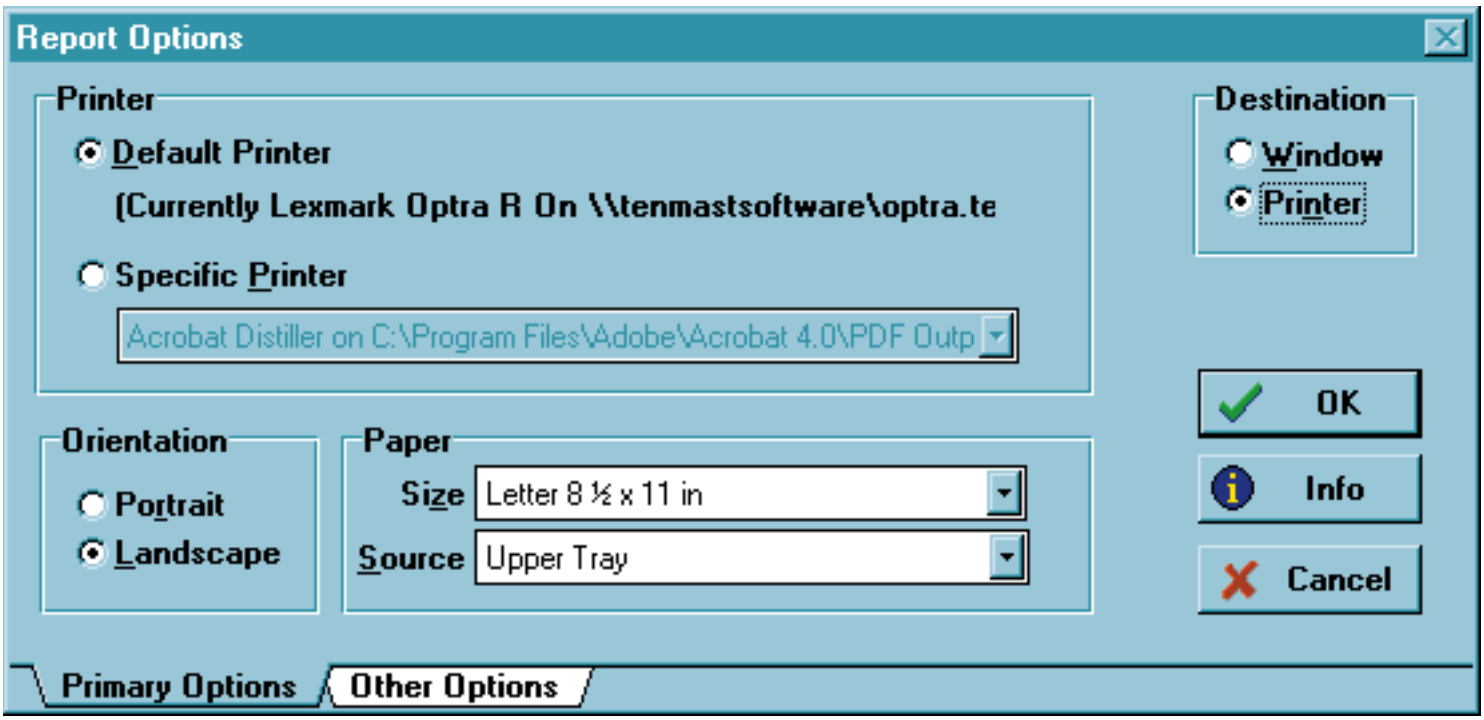
Reports Screen

The upper left portion of the Report Options screen contains the Which Report set of radio buttons. The controls visible on the rest of this screen change depending on what option is currently selected in the Which Report radio buttons.



Producing a Report

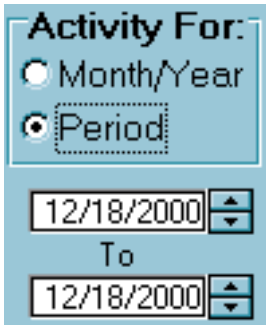
Once you have selected the report you want to produce and set the options you want, click the OK button. This opens the Report Options dialog box. If you are previewing the report on screen, select the Window option from the Destination set of radio buttons. If you are printing the report, select the Printer option from the Destination set of radio buttons and make sure that you have selected the correct printer. When you have set the options you want, click the OK button to print or preview the report. Click the Cancel button to close the Report Options dialog box and return to the Reports screen.



Common Report Formatting Options

The following three options are visible on the Report Options screen regardless of which report you have selected. However, they are grayed out (unavailable for use) with some reports.

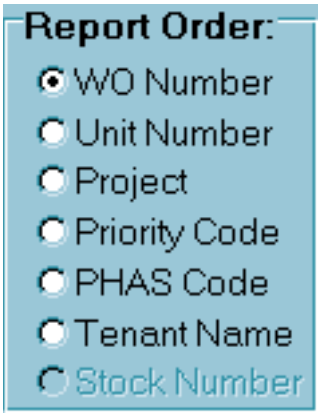
Activity For
The Activity For radio buttons allow you to select a specific month or a specific range of dates whose activity the report should cover.



If you select the Month/Year radio button, a pair of data fields is available directly below the radio buttons. These allow you to enter a month and year. For all months of a specific year, enter "13" in the month field.

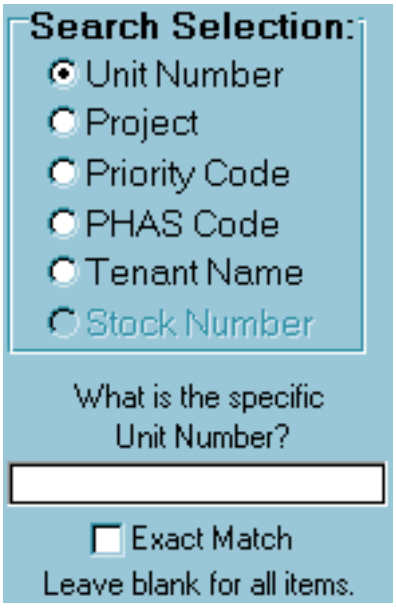
If you select the Period radio button, a pair of data fields is available directly below the radio buttons. These allow you to enter a pair of dates in MM/DD/YYYY format.

Report Order
This set of radio buttons allows you to select the order in which the report's individual items of data will be presented. You can sort the report by WO number, unit number, project, priority code, PHAS code, tenant name, or consumable item stock number.



Depending on the report that you have selected, some sort options may not apply. These options will be grayed out.

Search Selection
In most cases, you will want to produce reports that cover all applicable items. However, in some cases, you may need to produce a report that is filtered to only show specific items. The Search Selection set of radio buttons allows you to specify whether the report's data should be filtered for a specific unit number, project, priority code, PHAS code, tenant name, or consumable item stock number. Select the radio button that corresponds to the data for which you want to filter, then enter the specific target in the data field immediately below the radio buttons. For example, if you want a report to only cover work done on unit 608, select the Unit Number radio button and enter "608" in the data field.

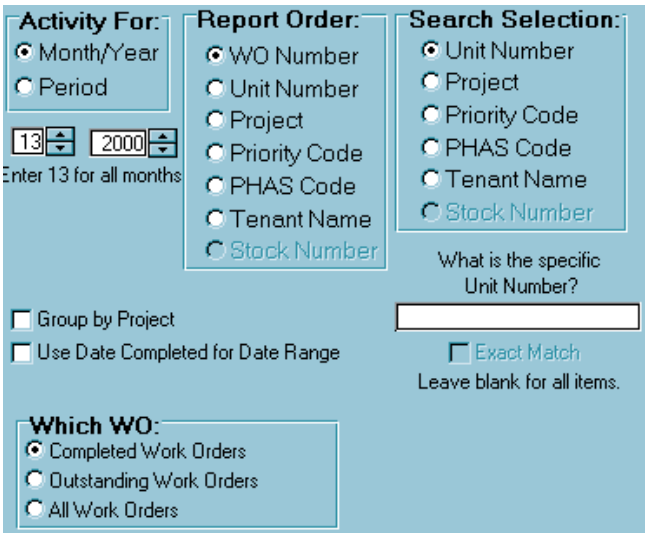


Depending on the report that you have selected, some search options may not apply. These options will be grayed out.

Available Reports and Formatting Options

Summary of WO Activity

The Summary of WO Activity report is a concise overview of all work order activity within a specific period of time. All three standard formatting options are available for this report. You also have three other options:



- If you check the Group by Project check box, the work orders on the report will be grouped by the project to which they apply, and sorted according to your Report Order selection within each project. If you do not check this box, they will simply be sorted by your Report Order selection.

- If you check the Use Date Completed for Date Range check box, the report will use each work order's completion date when checking against the Activity For formatting settings to determine if the work order should be included on the report. If you do not check this box, the program will use each work order's starting date.

- The Which WO set of radio buttons allows you to choose whether the report will include completed work orders, outstanding work orders, or all work orders.

Analysis Work Code Summary with Percentages

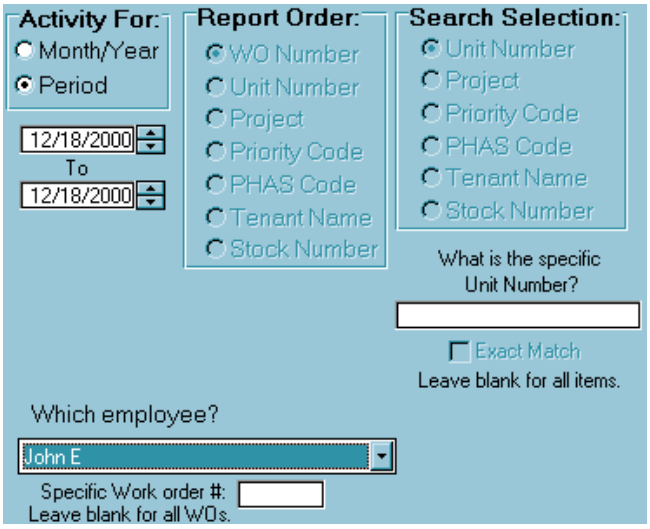
The Analysis Work Code Summary with Percentages report summarizes, by percentage, what work codes were applied to all work orders performed over a given period of time. For more information on work codes, see the Setup chapter of this manual. The Activity For formatting option is the only one available for this report.

Summary of a Single Employee
The Summary of a Single Employee report is a list of work orders being worked on or completed by a specific employee. The Activity For formatting option is the only standard option available for this report. You do have two other options:

• The Which Employee drop-down selection box allows you to select which employee's activity this report will cover.

NOTE: If you have regular and overtime records for an employee, you will have to select these separately and produce two reports to cover all of the employee's activity.

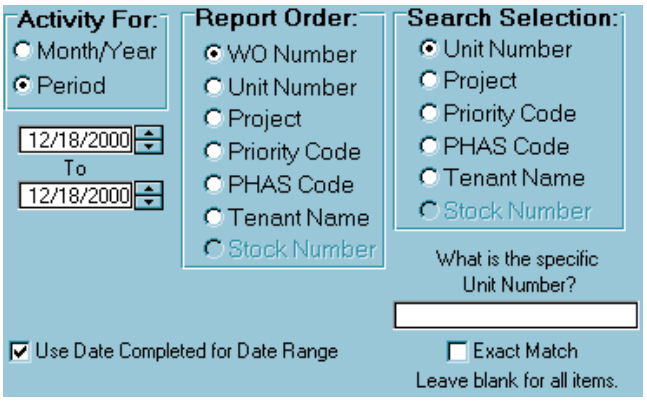
• The Specific Work Order # data field allows you to select one work order for the report to cover. If you do not enter anything in this field, the report will cover all of the employee's work orders.



Summary of all Workers
The Summary of all Workers report is a list of all work orders being worked on or completed for all workers. The Activity For formatting option is the only one available for this report.

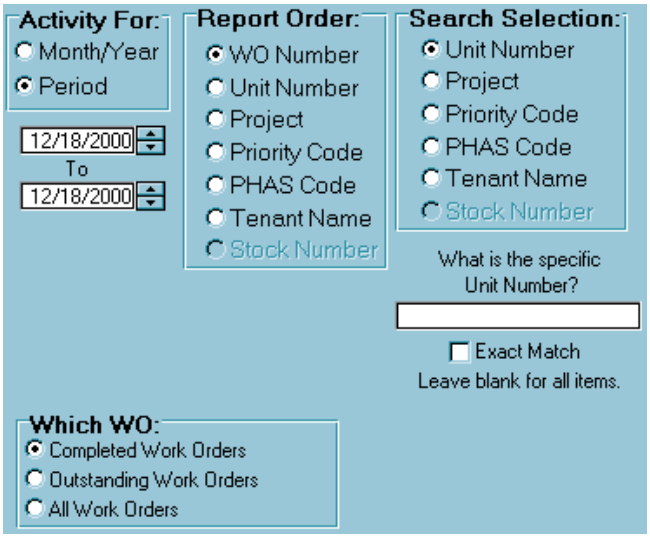
Summary of WOs with Tenant Charges
The Summary of WOs with Tenant Charges report lists all work orders which have a tenant charge associated with them. All three standard formatting options are available for this report. You also have one other option:

• If you check the Use Date Completed for Date Range check box, the report will use each work order's completion date when checking against the Activity For formatting settings to determine if the work order should be included on the report. If you do not check this box, the program will use each work order's starting date.



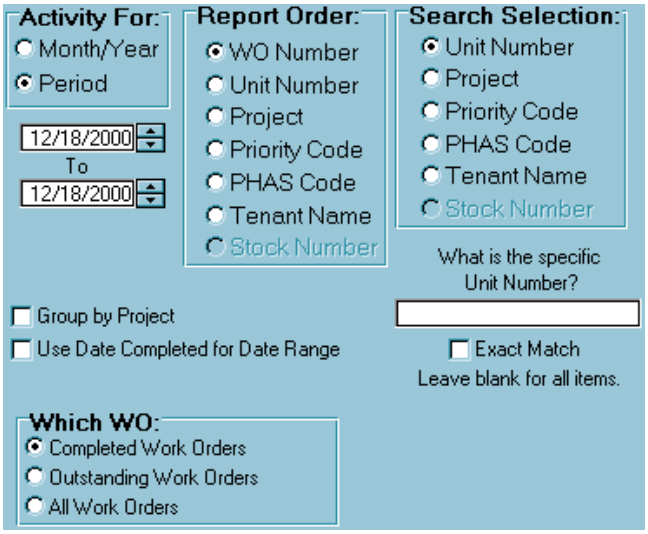
Summary of WOs Deferred for Contract Maintenance
The Summary of WOs Deferred for Contract Maintenance report is a listing of all work orders that have been deferred to an outside vendor for maintenance. All three standard formatting options are available for this report. You also have one other option:

• The Which WO set of radio buttons allows you to choose whether the report will include completed work orders, outstanding work orders, or all work orders.



Preventive Maintenance WOs

The Preventive Maintenance WOs report is a summary of all work orders for a specific period that were generated by the WinTen Preventive Maintenance program. All three standard formatting options are available for this report. You also have three other options:



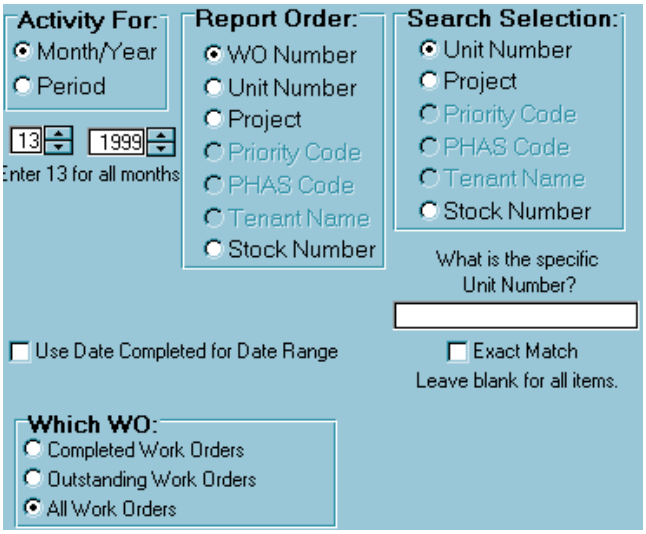
• If you check the Group by Project check box, the work orders the report covers will be grouped by the project to which they apply, and sorted according to your Report Order selection within each project. If you do not check this box, they will simply be sorted by your Report Order selection.

• If you check the Use Date Completed for Date Range check box, the report will use each work order's completion date when checking against the Activity For formatting settings to determine if the work order should be included on the report. If you do not check this box, the program will use each work order's starting date.

• The Which WO set of radio buttons allows you to choose whether the report will include completed work orders, outstanding work orders, or all work orders.

Material Items Used on WOs

The Material Items Used on WOs report is a summary of all material items that have been used for WO completion. All three standard formatting options are available for this report. You also have two other options:



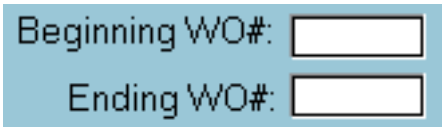
• If you check the Use Date Completed for Date Range check box, the report will use each work order's completion date when checking against the Activity For formatting settings to determine if the work order should be included on the report. If you do not check this box, the program will use each work order's starting date.

• The Which WO set of radio buttons allows you to choose whether the report will include completed work orders, outstanding work orders, or all work orders.

A Series of Work Orders

A Series of Work Orders report option allows you to print out a set of multiple, sequential work orders at one time. None of the standard report formatting options are available, as this option actually prints work order forms rather than producing a report.

When you select A Series of Work Orders, a pair of data fields appears directly below the Which Report radio buttons. Enter the starting and ending work order numbers in these fields to specify which work orders to produce.



Totals Report

The Totals Report is a summary of the total number of work orders received, total cost of these work orders, total number of work orders with tenant charges, total tenant charges, total costs of work orders with tenant charges, total number of outstanding work orders, and total number of work orders deferred for contract maintenance.

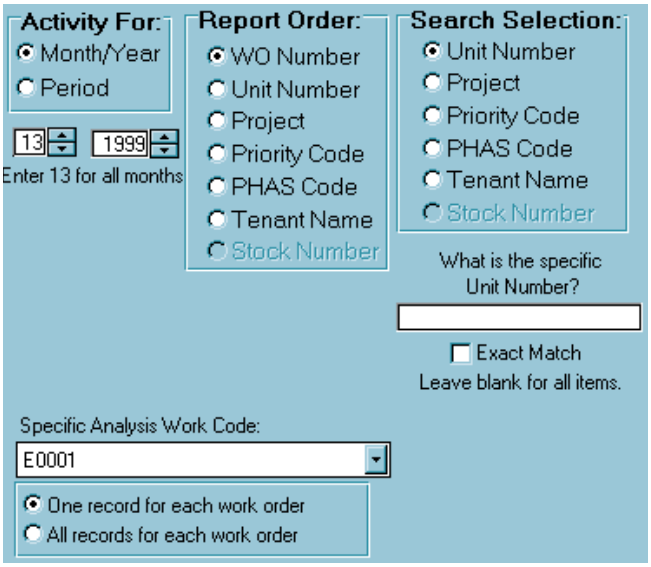
The only options available for this report are the Activity For set of radio buttons and the option to filter for a specific unit number.

Summary of Specific Analysis Work Code

The Summary of Specific Analysis Work Code report is a listing of all work orders that included a specific work code within a specific time period. All three standard formatting options are available for this report. You also have two other options:

• The Specific Analysis Work Code drop-down selection box allows you to specify which work code the report covers.

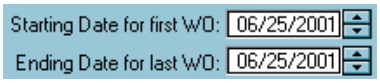
• The pair of radio buttons immediately below the Specific Analysis Work Code selection box allows you to consolidate work code listings (“One record for each work order”) or to list them separately (“All records for each work order”). If a given work code occurs multiple times in the same work order, the “One record...” option will only produce one summarized entry on the report for that code, while the “All records” option lists each occurrence separately.



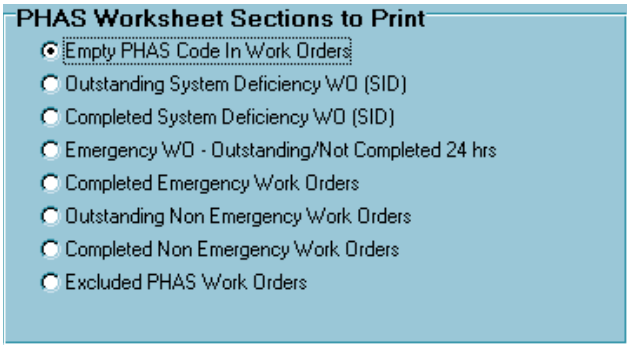
PHAS Worksheet

The PHAS Worksheet is a detailed report of all work orders organized by PHAS code. This report outlines the information by completed versus outstanding work orders. None of the standard report formatting options are available for this report.

When you select PHAS Worksheet, a pair of data fields appears directly below the Which Report radio buttons. Enter the starting and ending dates in these fields to specify the time period for the worksheet to analyze.



The PHAS Worksheet Sections to Print set of radio buttons also appears to the right of the Which Report radio buttons. Select the worksheet section you want to print. If you want to print multiple worksheet sections, you must select and print each one individually.


PHAS Worksheet Sections to Print
Empty PHAS Code In Work Orders
Outstanding System Deficiency WO (SID)
Completed System Deficiency WO (SID)
Emergency WO - Outstanding/Not Completed 24 hrs
Completed Emergency Work Orders
Outstanding Non Emergency Work Orders
Completed Non Emergency Work Orders
Excluded PHAS Work Orders

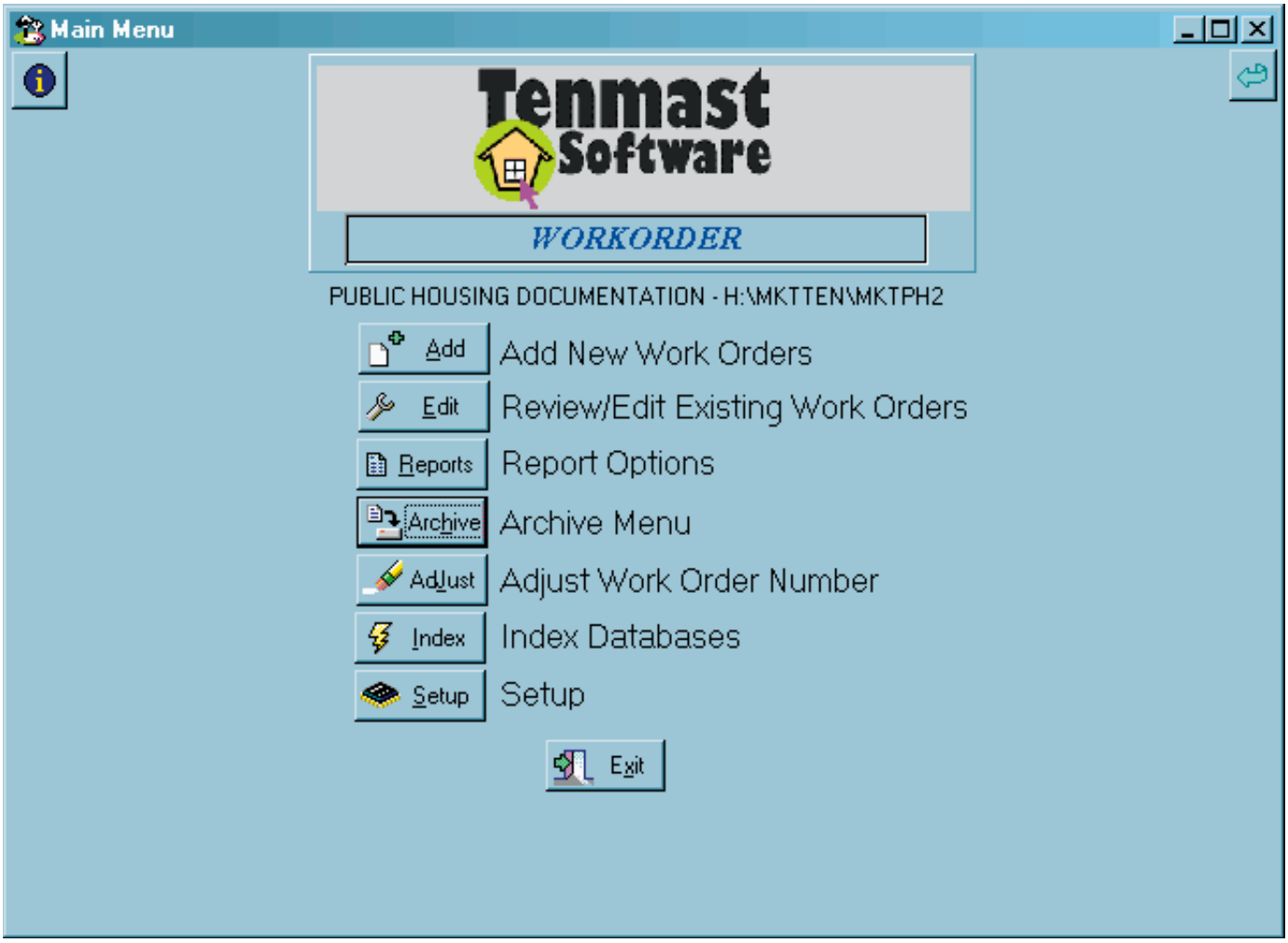
PHAS Report

The PHAS Report is a shorter version of the PHAS Worksheet, organized by PHAS code. None of the standard report formatting options are available for this report.

When you select PHAS Report, a pair of data fields appears directly below the Which Report radio buttons. Enter the starting and ending dates in these fields to specify the time period for the report to analyze.

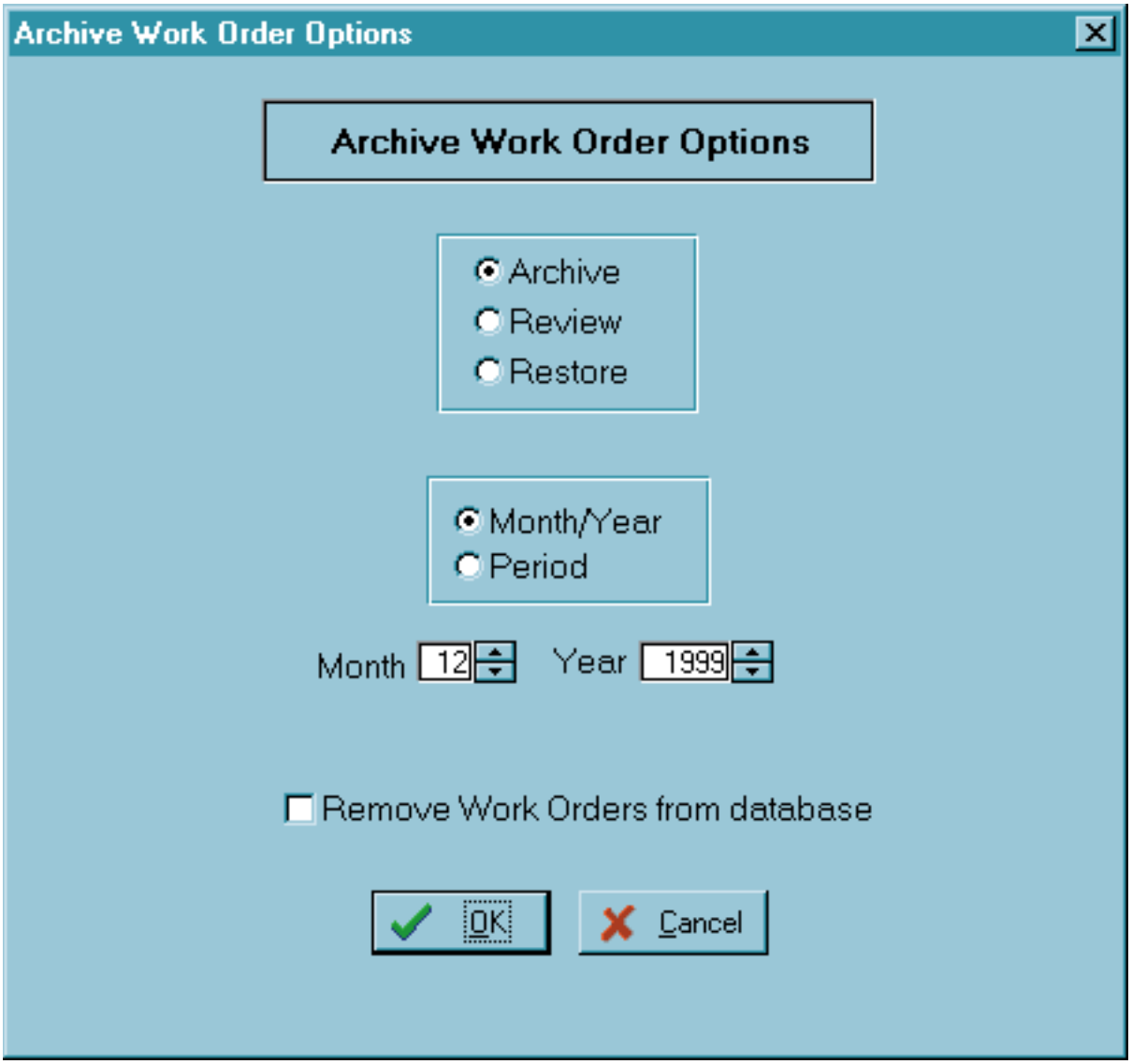
Archive/Restore Data

After your work orders have been completed and your end of period or year reports have been run, you may no longer need them in your WorkOrder database. The WorkOrder database could become rather large and may take up a lot of storage space. In order to alleviate this problem, you will want to archive, or copy to disk, any old, completed work orders. You may also want to view or restore to active use any completed work orders that you have previously archived. To access these functions, click the Archive Menu button or press <H> at the Main Menu. This opens the Archive Work Order Options dialog box.

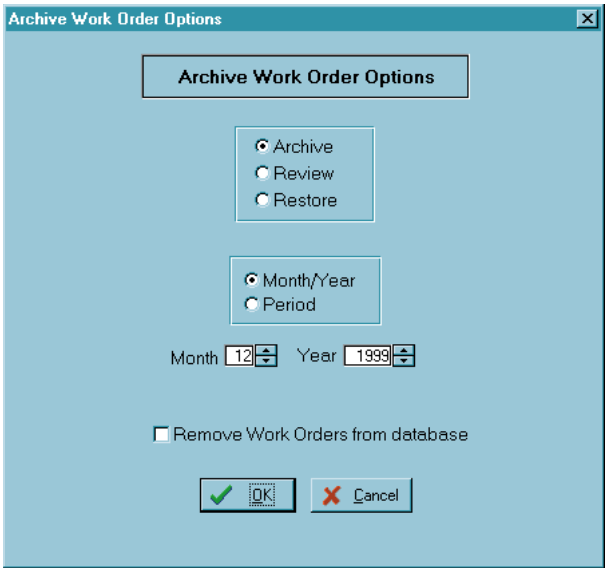


Archive Work Order Options Dialog Box

The Archive Work Order Options dialog box has a set of three radio buttons: Archive, Review, and Restore. Depending on which of these you have selected, the functionality of this dialog box changes.



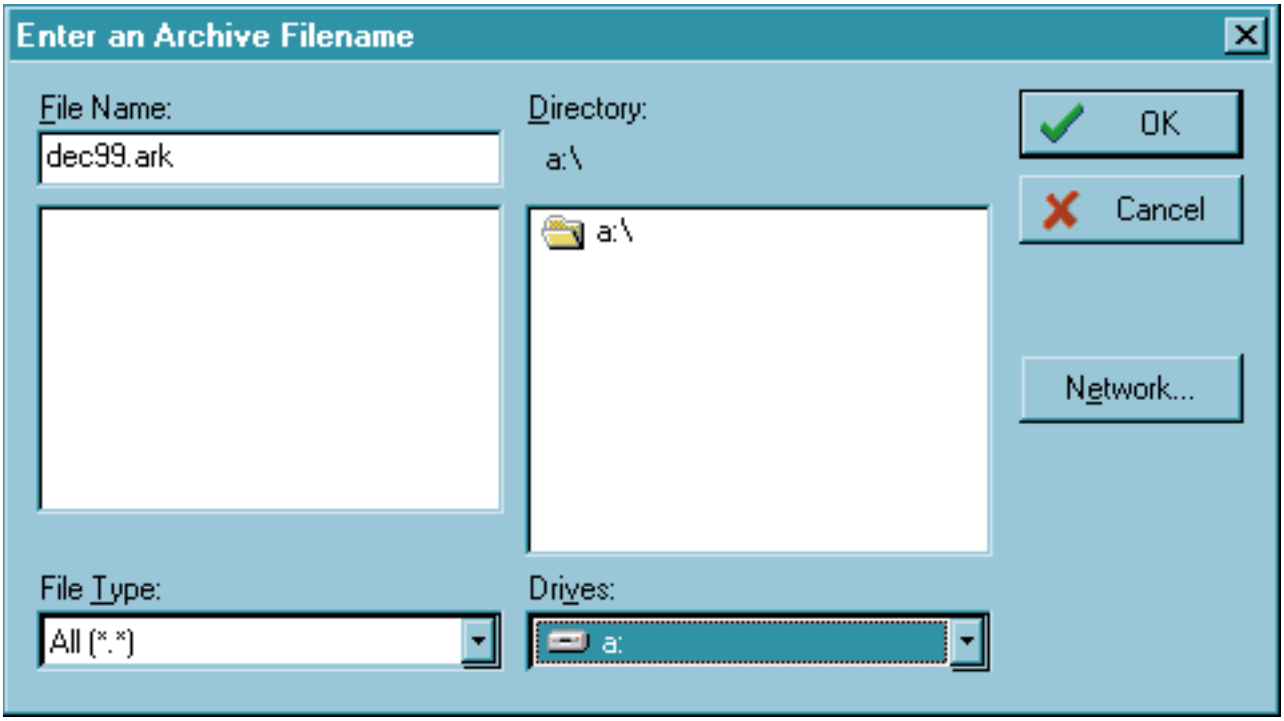
Archiving Work Orders



If the Archive radio button is selected, the dialog box displays the options shown to the right. This function allows you to save all of the work orders from a specific time period to an archive file. You can archive either all work orders that were completed in a specific month or all work orders that were completed between any two dates. The program will not archive incomplete work orders.

Select the month and year or the range of dates whose work orders you want to archive (if you select to archive across a range of dates, the Month and Year fields are replaced with two date fields). If you want to delete these work orders from the program's active database after they are archived, check the Remove Work Orders from Database check box.

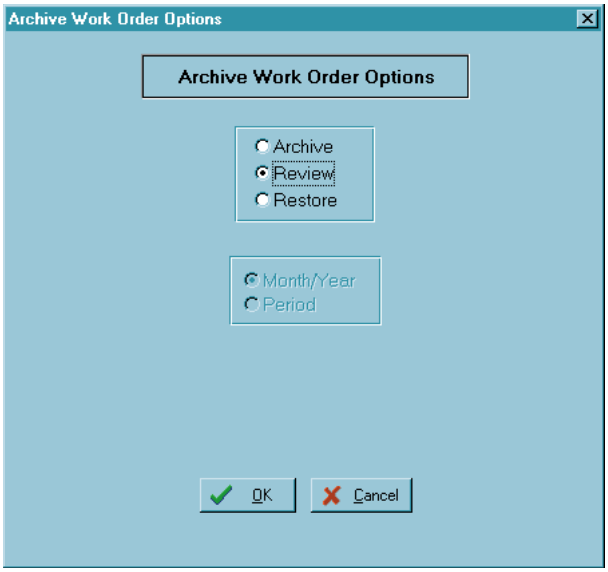
Once you have selected the options you want, click OK. The Enter an Archive Filename dialog box opens.



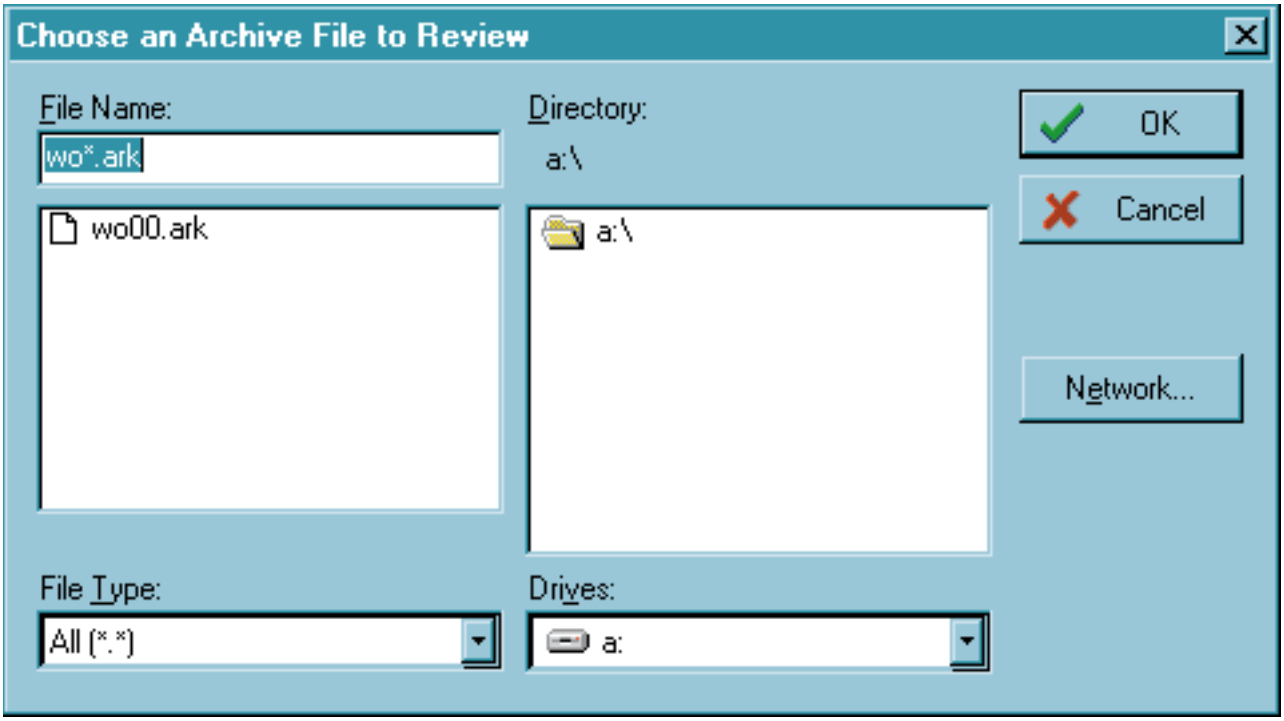
Select the location to which you want to save the archive file and enter the name for it, then click OK. The program saves the selected work orders to the archive file, then closes all associated dialog boxes and returns to the Main Menu.

Reviewing Archived Work Orders

If the Review radio button is selected, the dialog box displays the options shown to the right. This function allows you to review all of the archived work orders in a selected archive file.



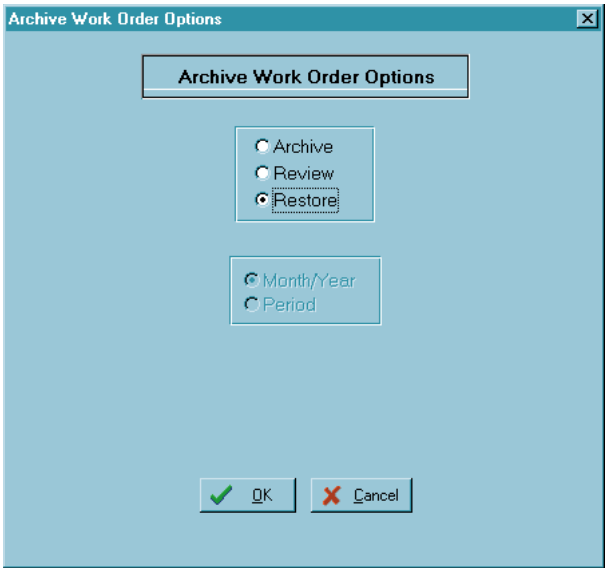
To review the contents of an archive file, click OK. The Choose an Archive File to Review dialog box opens.



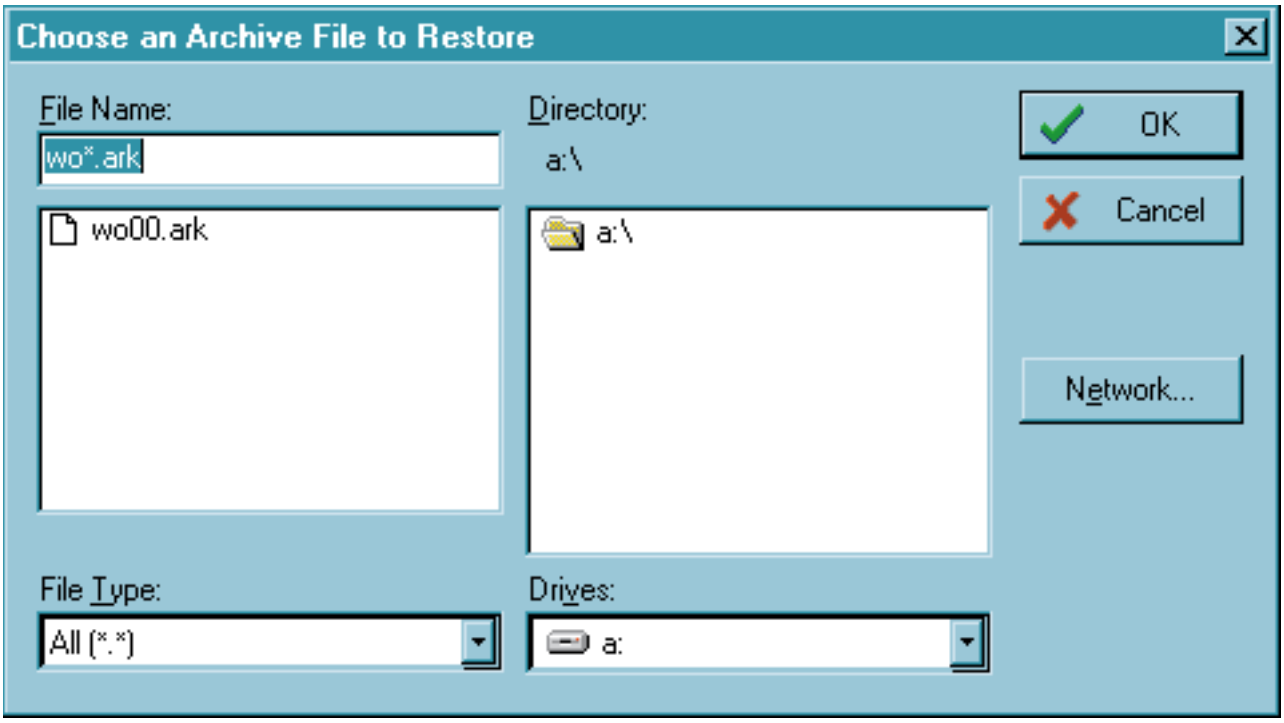
Select the location in which the file you want to review is, select the file to review, and click OK. The program opens the Review screen on the first work order in the archive. You can view all of the work order records in the archive just as you would view them if they were active records in the program's database. However, you cannot edit them unless you restore them first.

Restoring Archived Work Orders

If the Restore radio button is selected, the dialog box displays the options shown to the right. This function allows you to restore all of the archived work orders in a selected archive file to regular use, effectively un-archiving them and bringing them back into the program's work order database.



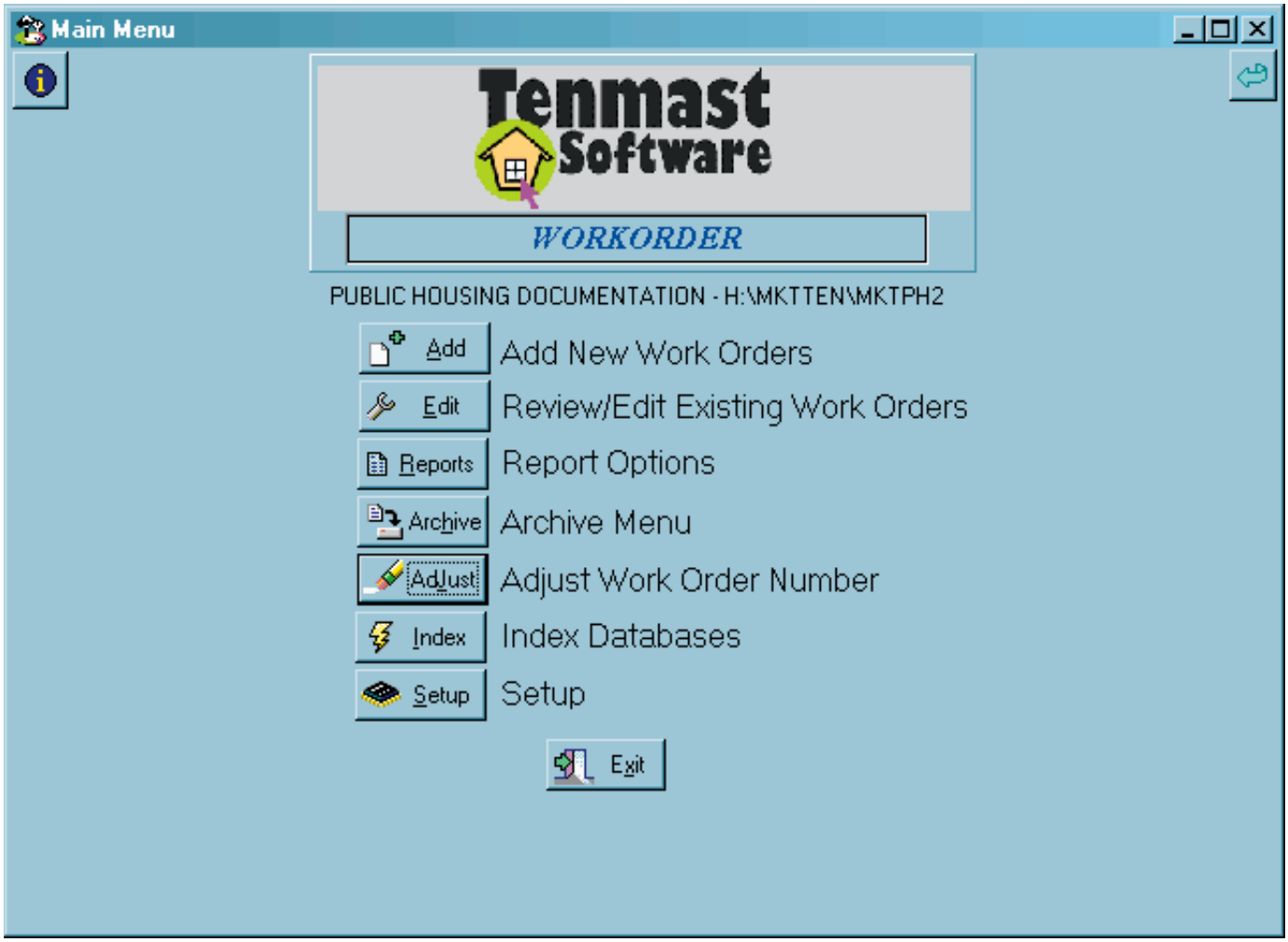
To restore the contents of an archive file, click OK. The Choose an Archive File to Restore dialog box opens.



Select the location in which the file whose records you want to restore is saved, select the file, and click OK. The program restores the records within the selected file to the active database, then closes all associated dialog boxes and returns to the Main Menu.

Adjust Work Order Number

When working with work orders, you may find a need to change the work order numbering. Adjusting the work order number allows you to change the next work order number to be used. To do this, click the Adjust button or press <J> at the Main Menu. This opens the Adjust WO# dialog box.

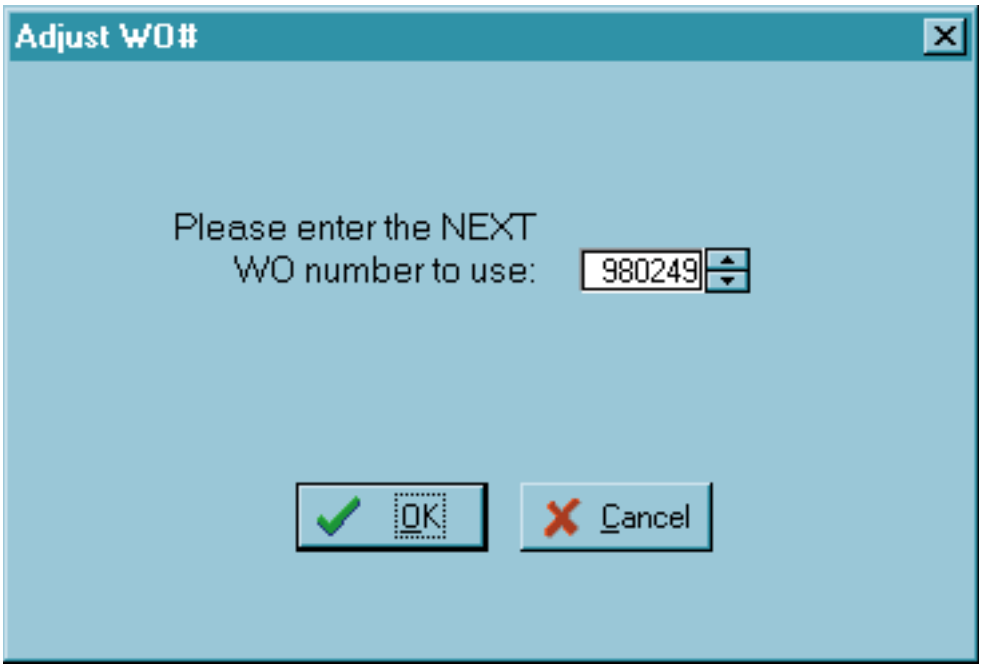


Adjust WO# Dialog Box

The Adjust WO# dialog box allows you to reset the next work order number to be used. The program's default numbering scheme, which it sets up upon initial installation, is "YYXXXX," where "YY" is the last two digits of the current year and "XXXX" is a unique four-digit number for that year. However, the "YY' portion of the number does not change when your system date changes, so you may want to reset the WO# to "YY0001" at the beginning of every calendar year.

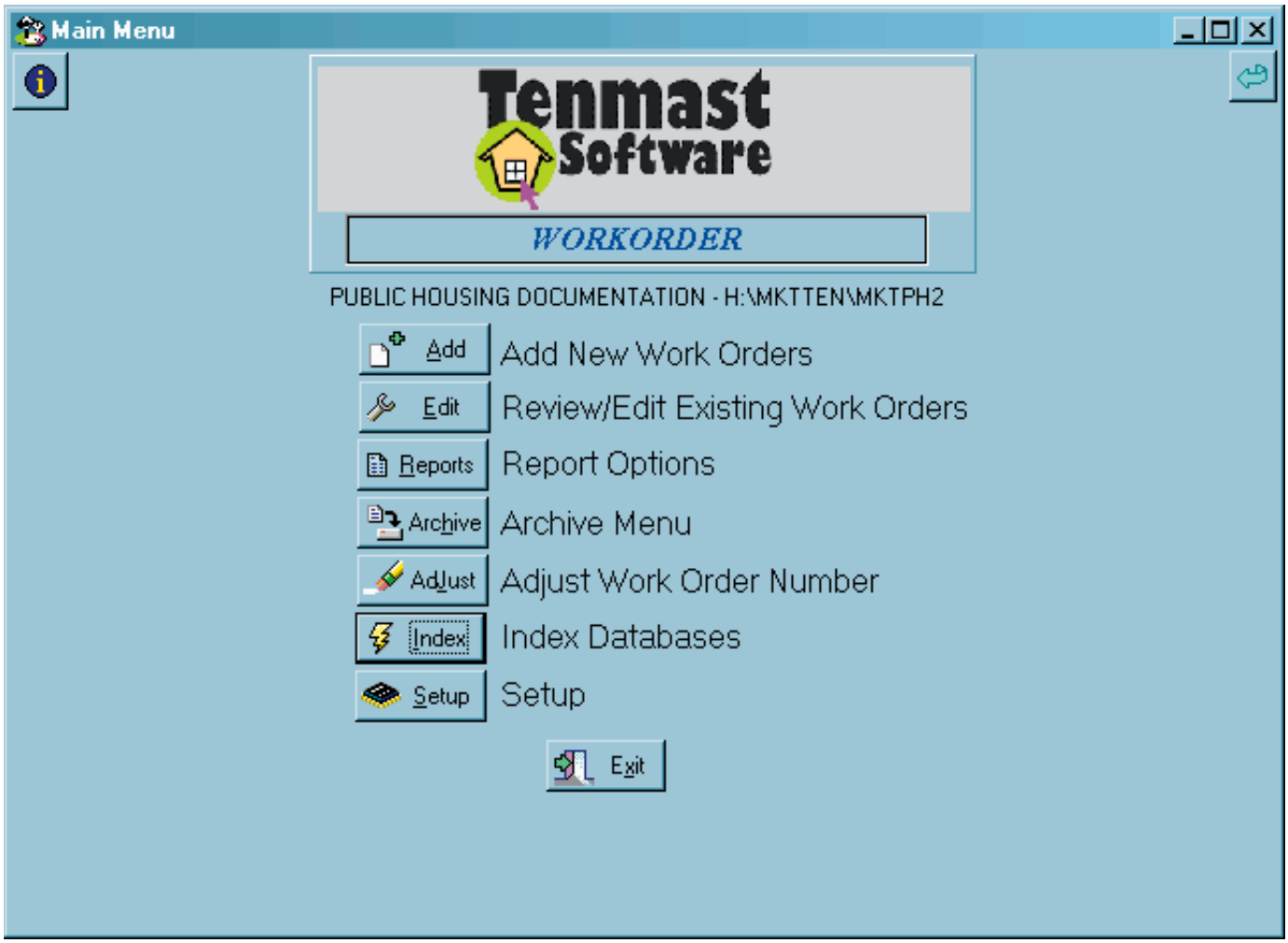
To reset the next WO# the program will assign, enter the number in the data field in this dialog box and click OK. The dialog box closes and the program returns to the Main Menu.

NOTE: If you set the next work order number to begin with a 0 (zero), the leading zero(s) will not be stored with the number. For example, if you change your next work order number to be 010001, the actual number that will be used will be 10001.



Index Databases

This function rebuilds the indexes that WorkOrder uses to search for specific records within its databases. Index files are similar to a library's card catalog - they tell the computer the location of the data for which you are searching. Indexing databases is safe to do at any time -it does not need to be done at a specific time of the month or the year. You can initiate the reindexing process by clicking the Index button or by pressing <I> from the Main Menu.



When to Reindex

Occasionally, index files can become corrupted. This means that such a file's data is no longer complete, and it may not be in a form that WorkOrder can read. The most common indicator of a corrupted index file comes when you search for an entry that you know is present and the program does not find it. Reindexing solves this problem by going through the database and rebuilding the index file for it.

CAUTION

You must make sure that no one else is using WorkOrder before using this feature. Reindexing rewrites files, which can cause damage to the data within those files if they are already open when WorkOrder attempts to index them.

When to Pack

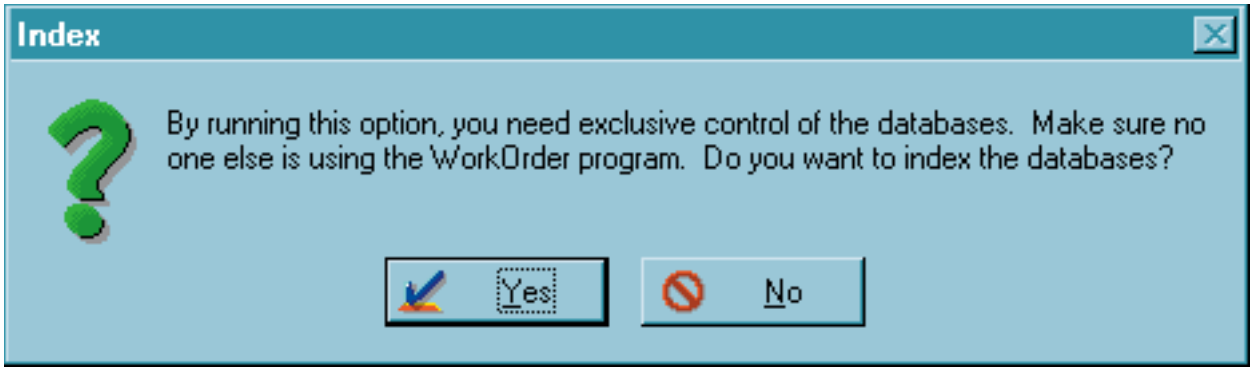
While you are reindexing, you also have the option to pack the database. Packing is a process by which WorkOrder removes all blank or deleted entries from its database, thereby reducing the size of the files.

CAUTION

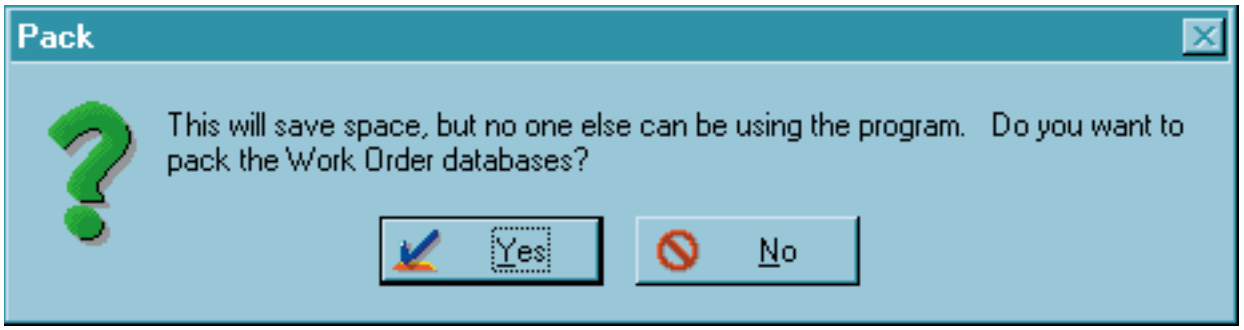
Tenmast does not recommend you perform packing unless specifically instructed to do so by Tenmast Training & Support personnel. Packing permanently removes deleted records. Once you have packed, data that the packing process erases will be irrevocably gone.

Reindexing and Packing

When you begin the reindexing process, a dialog box opens that asks you whether or not you want to index the database. Click Yes to continue the process. Click No to return to the Main Menu.


Index
By running this option, you need exclusive control of the databases. Make sure no one else is using the WorkOrder program. Do you want to index the databases?
Yes
No

If you click Yes, a second dialog box appears that asks you if you want to pack the database. Click Yes to pack in addition to indexing. Click No to simply index.



Once you click either button in the second dialog box, a “wait” dialog box appears that tells you that the indexing/packing process is in progress. Once this is complete, all associated dialog boxes close and the program returns to the Main Menu.

Index

A

Adjust Work Order Number 8.1
Archive and Restore Data 7.1

C

Colors 3.5
Consumable Inventory 2.1, 4.14, 4.15, 5.14, 5.15
  Setup 3.3

E

Employees 4.9, 4.12, 5.9, 5.12, 5.13
  Setup 3.8

I

Inspections. *See* Public Housing Inspections

L

Labor 3.6, 3.8, 4.10, 4.12, 5.10, 5.12

M

Materials 4.10, 4.14, 5.10, 5.14

P

PHAS 2.1, 3.4
  Codes 4.6, 5.6
Preventive Maintenance 2.1
  Setup 3.4
Price Codes
  Setup 3.10
Public Housing Inspections 2.1, 5.6
Purchase Order 2.1
  Setup 3.4

R

Reindex 9.1
Reports 6.1
  Printing 6.3
Restore Data. *See* Archive and Restore Data

S

Setup 3.1
  Colors 3.5
  Consumable Inventory 3.3
  Employees 3.8
  Preventive Maintenance 3.4
  Price Codes 3.10
  Purchase Order 3.4
  Tenant Accounts Receivable 3.4

T

Tenant Accounts Receivable 2.1
  Setup 3.4

W

WinTen
  Consumable Inventory 2.1
  PHAS 2.1
  Preventive Maintenance 2.1
  Public Housing Inspections 2.1
  Purchase Order 2.1
  Tenant Accounts Receivable 2.1
WO. *See* Work Orders
Work Codes 4.13, 5.13
  Setup 3.6
Work Orders
  Add 4.1
  Edit 5.1
  Employees 4.9, 4.12, 5.9, 5.12, 5.13
  Labor. *See* Labor
  Materials. *See* Materials; *See also* Consumable Inventory
  New 4.1
  Printing 4.4, 5.4
  Review 5.1
  Search 5.2